# Care Coordination (CC) Standardized Episodes of Care (SEOC) Software Version 1.17.0 Administrative User Guide



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# **Revision History**

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

Date	Revision	Description	Author
10/24/2022	6.0	<ul> <li>Updated for v1.17.0:</li> <li>Updated version number.</li> <li>Updated screens and definitions to include the Filter by Service Line menu, Filter by Billing Code field, and Import SEOCs.</li> <li>Added Filter by Service Line section.</li> <li>Added Filter by Billing Code section.</li> <li>Added Import SEOCs section.</li> </ul>	VetsEZ
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Date	Revision	Description	Author
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### **Artifact Rationale**

Per the Veteran-focused Integrated Process (VIP) Guide, the User's Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it will be updated as needed. A User Guide is a technical communication document intended to give assistance to people using a particular system, such as VistA end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

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## 1. Introduction

The Care Coordination (CC) Standardized Episodes of Care (SEOC) is a reference database for managing care bundles for use by Veterans Information Systems and Technology Architecture (VistA) and other Department of Veterans Affairs (VA) systems. Services are grouped together within the SEOC system into bundles so that clinicians can add these bundles to patients consult records in a standardized fashion, reducing the amount of time spent manually entering consult instructions, and providing uniformity among the patient records and across facilities for how patient care is prescribed for similar complaints.

These bundles group together one or more services that are preselected for different specialties to be added to the consult records. In addition, the clinician is provided with information regarding prescribing rules and preauthorization requirements, so they can make the most informed decisions regarding patient care.

Additionally, SEOC data will be accessible outside of the VistA/Computerized Patient Record System (CPRS) system so that users of downstream applications will be accessing the centralized data, and SEOC descriptions, reducing the chances of disconnects.

# 1.1. Purpose

The purpose of this document is to provide instruction for utilizing the SEOC application to standardize and streamline consult management for Community Care.

## 1.2. Document Orientation

The Care Coordination (CC) Standardized Episodes of Care (SEOC) v1.17.0 Administrative User Guide will provide explanations of each screen and of all user interface options within the context of an easy-to-understand demonstration data scenario.

This document is also designed to provide the user with screen-by-screen "how to" information on the usage of CC SEOC.

## 1.2.1. Organization of the Manual

#### **Section 1: Introduction**

The Introduction section provides the purpose of this manual, an overview of the SEOC software, an overview of the software used, project references, contact information for the user to seek additional information, and an acronyms and abbreviations list for this manual.

#### **Section 2: System Summary**

The System Summary section provides a graphical representation of the equipment, communication, and networks used by the system, user access levels, how the software will be accessed, and contingencies and alternative modes of operation.

### **Section 3: Getting Started**

Information for the Getting Started section provides a general walk-through of the system from initiation through exit, enabling the user to understand the sequence and flow of the system.

#### **Section 4: Using the Software**

This section gives the user the "how to" information to use SEOC, including many step-by-step procedures.

## **Appendix A: Troubleshooting**

This section provides troubleshooting for the SEOC user.

### **Appendix B: Acronyms and Abbreviations**

This section provides a list of acronyms and abbreviations found in this document.

#### **Appendix C: JSON Instructions**

This section provides instructions on how to convert the SEOC JSON file to an Excel file.

## 1.2.2. Assumptions

This guide was written with the following assumed experience/skills of the audience:

- The SEOC user has been assigned the user role of SEOC Viewer. The SEOC Viewer can view Active or Discontinued SEOCs on the Home Page. These users can View, Print, or Track Version Changes on selected SEOCs.
- User has Google Chrome and/or Internet Explorer 11 installed on their machine.

**NOTE:** Please note that SEOC is not fully 508 compliant in Microsoft Edge, so the VA will continue to support 508 in only Google Chrome and Internet Explorer 11.

- The SEOC user has basic knowledge of the SEOC system (such as the use of commands, menu options, and navigation tools).
- The SEOC user has been provided the appropriate active roles, menus, and security keys required for the SEOC User Interface (UI), as defined below in User Roles.
- The SEOC user is using SEOC to perform their daily consult creation workflow and perform the required SEOC functions.
- The SEOC user has validated access to the SEOC UI.
- The SEOC user has been provided training on the SEOC UI and has reviewed the User Guide.

#### 1.2.3. Coordination

One Consult - Consult Toolbox 1.9.02 and above and the HealthShare Referral Manager (HSRM) depend on the availability of the SEOC System. Consult Toolbox 1.9.02 requires active SEOCs whereas HSRM requires active and discontinued SEOCs. Coordination between the One Consult – Consult Toolbox, HSRM, and SEOC team is necessary with any updates to SEOC.

## 1.2.4. Disclaimers

#### 1.2.4.1. Software Disclaimer

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely provided that any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

#### 1.2.4.2. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

## 1.2.5. Documentation Conventions

This manual uses several methods to highlight different aspects of the material.

Table 1. Documentation Symbols and Descriptions

Symbol	Description
A	CAUTION: Used to caution the reader to take special notice of critical information.

**NOTE:** Notes are used to inform the reader of general information including references to additional reading material.

#### 1.2.6. References and Resources

Readers who wish to learn more about CPRS and CC SEOC should consult the <u>VA Software</u> Document Library.

## 1.3. National Service Desk and Organizational Contacts

For issues related to the CC SEOC that cannot be resolved by this manual or the site administrator, please contact the National Service Desk at 855-NSD-HELP (673-4357).

# 2. System Summary

There was an immediate need to provide clinicians the ability to add care bundles quickly and consistently to a patient's consult record within VistA. SEOC provides this feature for a higher level of uniformity in patient care, easier access to appropriate services, based on initial

diagnoses, and the ability to better control care costs. SEOC allows clinicians to enhance the coordination of care for the Veteran.

The system contains SEOCs, or care bundles, that clinicians or other designated individuals can assign to VA patients. These bundles allow for the consistent use of procedures when certain conditions are diagnosed. This consistency allows the VA to effectively manage patient care and provides easier traceability.

# 2.1. System Configuration

The SEOC System is designed to be a simple reference database with a supporting SEOC API and User Interface (UI) layer. The SEOC system comprises three application tiers as shown below.

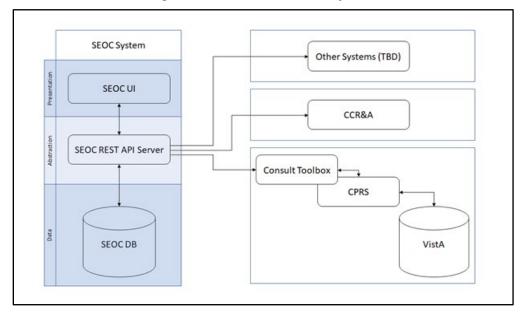


Figure 1: Overview of SEOC System

The first tier is the Data Tier. This tier contains SEOC data. SEOC uses Microsoft Structured Query Language (SQL) Server is the database. SEOC data consists of reference data, such as SEOC name, associated procedures, associated Current Procedural Terminology (CPT) codes, procedure durations, etc. Additionally, user role information is maintained within the tables, but no passwords or other credentials are stored. No PHI or PII is stored in the database. SEOC data is associated with patient data in the VistA consult record.

The second tier is the Abstraction Tier. This tier acts as the data broker for the SEOC system. It is a REST Application Programming Interface (API), built as a microservice hosted on container infrastructure (Docker Container). The API itself is built on the Spring MVC framework. The API receives web API calls that are forwarded to the database appropriately. Consuming applications can query the SEOC system through the SEOC REST API but will not be able to perform updated operations. The SEOC UI uses certificates to authenticate with the SEOC REST API to allow data modification within the SEOC system by authenticated users. Users are authenticated using SSOI. Additionally, a VistA/MUMPS patch is created to insert the SEOC associations into File # 123.

The third and final tier is the Presentation Tier. This tier consists of the SEOC UI, which provides a user interface for approved, authenticated users to maintain the SEOC collection. This application is a web application built as a microservice hosted on container infrastructure (Docker Container). The UI is built using the React.js JavaScript framework for web applications.

## 2.2. Data Flows

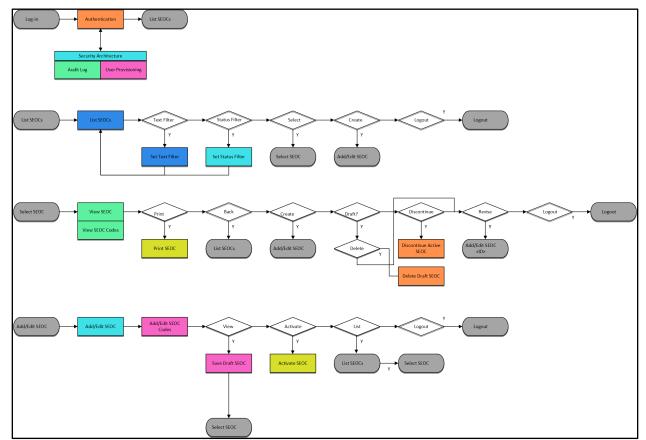


Figure 2: SEOC Data Flow Diagram

# 2.3. User Access Levels

SEOC user profiles comprise of the following "types of users":

- SEOC Content Authors: The SEOC Content Authors are responsible for creating and update the content within the SEOC repository using the SEOC UI. These users are required to VA access rights and privileges and will sign on to the SEOC application using their SSOI credentials (typically their PIV and access code).
- CPRS Clinicians that are responsible for documenting patient consult records. These clinicians utilize the SEOC content as part of their daily consult creation workflow such that they will add a SEOC bundle to the patient consult record which will provide for a standardized documentation and care plan approach across the VA for these consults.

• SEOC data is also accessible to other external consumers in the future (in addition to CPRS users). The SEOC API is a RESTFul API that other (to be determined) users will have access to use.

# 2.4. Continuity of Operation

The SEOC system is maintained by Enterprise Operations (EO). The continuity of operations is managed by EO.

# 3. Getting Started

This section provides a general walkthrough of CC SEOC from initiation through exit for SEOC Viewer users.

# 3.1. Logging On

CC SEOC is accessed using the VA Single Sign-On Internal (SSOi) log in using the following URL: <a href="https://seoc.va.gov/">https://seoc.va.gov/</a>

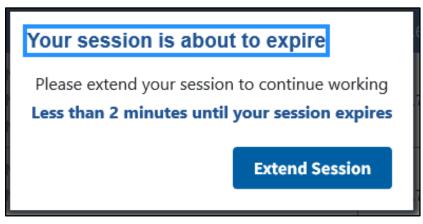


Figure 3: VA Single Sign-On for SEOC

**NOTE:** After 15 minutes of inactivity the system will automatically log you out. After 13 minutes of inactivity the system will prompt you to extend your session.

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Figure 4: Session Timeout Warning

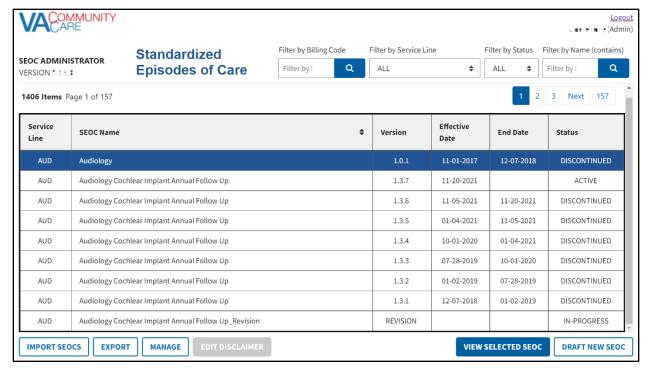


NOTE: The current session is refreshed when a Request is Made to the API, a SEOC is updated, a Search or Filter is performed, or any fields for a User or Billing Code are updated.

## 3.2. System Menu

The Standardized Episodes of Care dashboard offers several features: Filter by Billing Code, Filter by Service Line, Filter by Status, Filter by Name, Import SEOCs, Export, Manage, Edit Disclaimer, View Selected SEOC, and Draft New SEOC. The home page also displays the username at the top right of the page.

Figure 5: Standardized Episodes of Care Dashboard





**CAUTION**: To view the list of SEOCs using a keyboard interface with assistive technology, you will need to use the "Tab" key to navigate through the list.

Standardized Episodes of Care table fields:

- Service Line A broad category of care for the services and procedures included which is intended to be used to group and filter SEOCs for easier accessibility. A standardized three-letter abbreviation of the service line is included at the beginning of the SEOC ID.
- **SEOC Name** A unique title that categorizes a SEOC by specialty/subspecialty or area of clinical practice.
- Version The version number of the SEOC. The version number is formatted A.B.C where the first digit will be 1, the second digit is the number of published SEOCs in the same Category of Care when a new SEOC is activated, and the third digit is a serialized revision number.
- Effective Date The date the SEOC status was made from In-Progress to Active.
- End Date The date the SEOC status was discontinued.
- **Status** The SEOC statuses are as follows:
  - o **Active**: When a SEOC is Active, it will be available for all end users (e.g., API users, scheduling, payment, and auditing purposes).
  - Date Hold: When the SEOC status is Date Hold, it is pending and set for activation on a designated future date. This status is only available for SEOC Administrative users for editing purposes.
  - O **Discontinued**: When a SEOC is Discontinued, read-only users will not have access to the discontinued SEOC in the SEOC Database and or the scheduling interface. However, the discontinued version will still be available for payment and auditing purposes. Discontinued SEOCs will remain in the SEOC database for up to six (6) years in the central repository.
  - In-Progress: The SEOC is available for editing purposes by the Administrators and Authors prior to activation. These SEOCs will not be available via SEOC Database API.

# 3.3. Changing User ID and Password

If you need to change your user password, you will need to contact your local PIV office.

## 3.4. Exit System

If you are finished working, log out of VA Single Sign-On and close any secure sessions that may still be open by selecting the **Logout** button.

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# 4. Using the Software

The CC SEOC provides user functionality for the following items:

- Manage Users
  - Filtering Users
    - Filter Users by Role
    - Filter Users by User Name or VA Network ID
  - o Delete a Selected User
  - o Edit a Selected User
  - o Add a New User
- Importing SEOCS
- Exporting Data
  - Export the SEOC Data to a JSON File
  - Export the VA PreCert Webpage to a JSON Fil
- Manage Billing Codes
  - Search for a Billing Code
  - o Deleting Billing Codes
  - o Editing Billing Codes
  - o Return to SEOC List
  - o Exit Maintenance Mode
  - Extend the Current Session
  - o Edit the General Disclaimer
  - Deactivate the General Disclaimer
- Viewing SEOCs
  - View a Selected SEOC
  - View Filtered SEOCs
    - Filter SEOCS by Billing Code
    - Filter SEOCS by Service Line
    - Filter SEOCs by Status
    - Filter SEOCs by Name
      - Sort SEOCs Alphabetically by Name
  - Discontinue a SEOC
  - o Print a SEOC
  - Invalid Characters
    - Show Invalid Characters
    - Fix Invalid Characters
  - Track Version Changes
- Draft a New SEOC

- o Edit an In-Progress SEOC
- Activate an In-Progress SEOC
- Delete an In-Progress SEOC
- Pending Revisions
  - o Create a Revision
  - o Activate a Revision
  - Revert a Date Hold SEOC Back to In-Progress

## 4.1. Manage Users

The SEOC Admin UI supports the following user roles:

- Viewer: Read-Only. This user will only see Active or Discontinued SEOCs on the
  Home Page. They are only able to View, Print, or Track Version Changes on selected
  SEOCs. This user will not see Provider Codes on the View SEOC Page, the Track
  Changes Page, and the Print SEOC Page. Also, by default the SEOC List will show
  only Active SEOCs for this user.
- Analyst: Has all the privileges of the Viewer but can also view Date Hold SEOCs. They can also Export SEOC Data or Export VA PreCert Webpage Data to a JSON file.
- Author: Has all the privileges of the Viewer but can also view In-Progress or Date
  Hold SEOCs. They can also Draft a New SEOC, Create Pending Revisions, Delete
  SEOCs, or Edit SEOCs. This user will see Provider Codes on the View SEOC Page,
  the Track Changes Page, and the Print SEOC Page.
- Publisher: Has all the privileges of the Author but can also Activate or Discontinue SEOCs, Export SEOC Data or Export VA PreCert Webpage Data to a JSON file and Edit the General Disclaimer.
- **Coder**: Has all **Publisher** capabilities, and can manage billing codes, but CANNOT activate, deactivate, reactivate, or modify activation.
- Administrator: Has all the privileges of the Publisher, but can also open the User Management page, Add New Users, Edit Users, or Delete Users. However, an Administrator can't modify their own privileges. This ensures there will always be at least one Administrator.

To manage users for the SEOC Admin UI, follow the steps listed below:

1. As an **Administrator** on the SEOC Admin home page, select **Manage Users** from the **Manage** menu. The **User Management** window displays.

P- 分分類 ® **←** ⊕ **@** → 🗎 🖒 Search... User Management Convert ▼ 🗟 Select COMMUNITY CARE Logout (Admin) Filter by Role Filter by Name (contains) SEOC ADMINISTRATOR **User Management** Filter by Name Q VERSION " " " **VA Network ID User Name** Role Domain mw22120333 **ADMINISTRATOR** MWT2 222 mwtest2535 **ANALYST** 456TEST4 6542 New User VIEWER NEWUSERID RETURN TO SEOC LIST DELETE SELECTED USER **EDIT SELECTED USER** ADD NEW USER

Figure 6: User Management

## 4.1.1. Filtering Users

## 4.1.1.1. Filter Users by Role

To filter the list of users in SEOC by role, follow the steps listed below:

1. From the SEOC Admin home page, select Manage. The Manage dialog box displays.

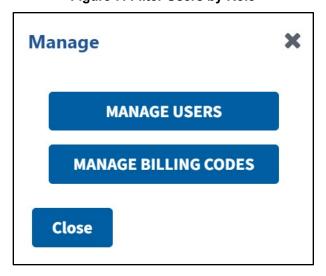


Figure 7: Filter Users by Role

- 2. Select Manage Users. The User Management window displays.
- 3. From the **Filter by Role** drop-down menu, select **All**, **Viewer**, **Analyst**, **Author**, **Coder**, **Publisher**, or **Administrator** to filter the list of users by role. The list refreshes to display the role selected.

COMMUNITY Logout vacoScorcg (Admin) Filter by Role Filter by Name (contains) SEOC ADMINISTRATOR ALL Q Filter by Name **User Management VERSION 1.16.0** Role **User Name VA Netv** Domain VIEWER ANALYST test 508 user VIEWER NONE NONE AUTHOR CODER test 508abcd VIEWER Α PUBLISHER ADMINISTRATOR test 508user VIEWER ABCD1234 test abcd508 VIEWER S Е TESTUSER TEST User 2 TESTUSER2 VIFWFR DEV test1111111 ANALYST TTTT TTTTT test923 11111 VIEWER 11111 testa VIEWER 423342 34343 Tester VIEWER TESTER DEV TestPaul 923 VIEWER 12345 123454 RETURN TO SEOC LIST DELETE SELECTED USER EDIT SELECTED USER ADD NEW USER

Figure 8: Filter Users by Role

## 4.1.1.2. Filter Users by User Name or VA Network ID

To filter the list of users in SEOC by user name or VA network ID, follow the steps listed below

- 1. From the SEOC Admin home page, select **Manage Users**. The **User Management** window displays.
- 2. From the **User Management** page, enter the User Name or VA Network ID of the user in the **Filter by Name (contains)** field.

Figure 9: Filter by Name Field



3. Select the **Search** button. The **Filter by Name Results** display.

\_ \_ P - 6 ☆ 6 0 0 → 🗎 🖒 Search... × User Management Convert ▼ 🗟 Select COMMUNITY CARE Logout --- (Admin) Filter by Role Filter by Name (contains) SEOC ADMINISTRATOR **User Management** \$ × Q VERSION 111 User Name Role **VA Network ID** Domain mwtest2535 ANALYST 456TEST4 6542 ADMINISTRATOR SEOCSYSTEMUSER DEV Test User RETURN TO SEOC LIST DELETE SELECTED USER **EDIT SELECTED USER** ADD NEW USER

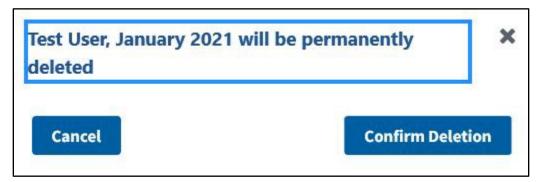
Figure 10: Filter by Name Results

#### 4.1.2. Delete a Selected User

To delete a user from the User Management list, follow the steps listed below:

- 1. From the SEOC Admin home page, select **Manage Users**. The **User Management** window displays.
- 2. From the list of users, select the user that you would like to delete.
- 3. Select **Delete Selected User**. A message displays confirming that you would like to delete the user.

Figure 11: Confirm User Deletion



4. Select **Confirm Deletion**. The **User** will be deleted from the **User List** and a confirmation message will display.

П **←** (⇒) **@** → 🗎 🖒 Search... ○ □ □ □ □ User Management x 📑 x Convert ▼ 🗟 Select COMMUNITY Logout (Admin) Filter by Role Filter by Name (contains) SEOC ADMINISTRATOR Q **User Management** Filter by Name VERSION I The user Test User, January 2021 has been deleted × User Name **VA Network ID** Domain mwtest2535 ANALYST 456TEST4 6542 New User VIEWER NEWLISERID DEV RETURN TO SEOC LIST DELETE SELECTED USER **EDIT SELECTED USER** ADD NEW USER

Figure 12: User Deleted Confirmation Message

**NOTE:** The confirmation message can be dismissed by selecting the X button.

## 4.1.3. Edit a Selected User

To edit a user in SEOC, follow the steps listed below:

- 1. From the SEOC Admin home page, select **Manage Users**. The **User Management** window displays.
- 2. From the list of users, select the user that you would like to edit.
- 3. Select **Edit Selected User**. The **Edit User** form will display, populated with the selected **User** information.

→ 🗎 🖒 Search... ₽→ 命☆戀@ Edit Selected User Convert ▼ 🖥 Select OMMUNITY Logout (Admin) Filter by Role Filter by Name (contains) SEOC ADMINISTRATOR User Management test VERSION \*All fields are required Domain **VA Network ID** Role (22 characters (32 characters remaining) (15 characters remaining) SEOCAUTHOR DEV AUTHOR Test User, January CANCEL SAVE

Figure 13: Editable User Fields

- 4. Edit the User Name, Role, VA Network ID, and Domain fields as needed.
- 5. Select **Save**. The updated user will display in the list of users.

P- 分分類 ® **←** (→) **@** → 🗎 🖒 Search... × User Management Convert ▼ 🗟 Select COMMUNITY CARE Logout (Admin) Filter by Role Filter by Name (contains) SEOC ADMINISTRATOR **User Management** = Q VERSION The user Test User, January 2021 has been saved × **User Name** Role **VA Network ID** Domain rest use ADMINISTRATOR SEUCSTSTEMUSER DEV SEOCAUTHOR Test User, January 2021 AUTHOR DEV RETURN TO SEOC LIST DELETE SELECTED USER **EDIT SELECTED USER** ADD NEW USER

Figure 14: Updated User Displayed in the User List

**NOTE:** If any of the fields are not populated, or if **VA Network ID** or **Domain** have characters other than letters and numbers, an error message will display when you select **Save**.

**NOTE:** Both the error message and the confirmation message can be dismissed by selecting the X button.

#### 4.1.4. Add a New User

To add a new user from the User Management list, follow the steps listed below:

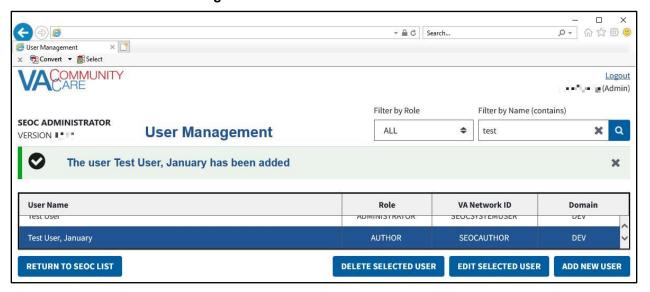
- 1. From the SEOC Admin home page, select **Manage**, and select **Manage Users**. The **User Management** window displays.
- 2. Select Add New User. The Add New User form displays.

**←** (⇒) **@** → 🗎 🖒 Search... ○ □ □ □ □ Add New User Convert ▼ 🗟 Select COMMUNITY Logout - (Admin) Filter by Role Filter by Name (contains) SEOC ADMINISTRATOR **User Management** ALL = VERSION II \*All fields are required Domain Role (25 characters (25 characters remaining) (50 characters remaining) remaining) VIEWER \$ CANCEL

Figure 15: Add New User

- 3. In the **User Name** field, which is required, enter the users name.
- 4. From the Role menu, which is required, select Viewer, Analyst, Author, Coder, Publisher, or Administrator.
- 5. In the VA Network ID field, which is required, enter the name of the VA network.
- 6. In the **Domain** field, which is required, enter the name of the domain.
- 7. Select the **Save** button. The new **User** will appear in the **User List** and a confirmation message will display.

Figure 16: New User Added to the List



**NOTE:** If any of the fields are not populated, **VA Network ID** or **Domain** have characters other than letters and numbers, or if **User Name** has a backslash character, an error message will display when you select **Save**.

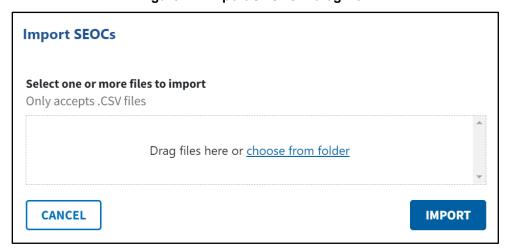
**NOTE:** Both the error message and the confirmation message can be dismissed by selecting the X button.

# 4.2. Importing SEOCs

To import a SEOC or multiple SEOCs, follow the steps listed below:

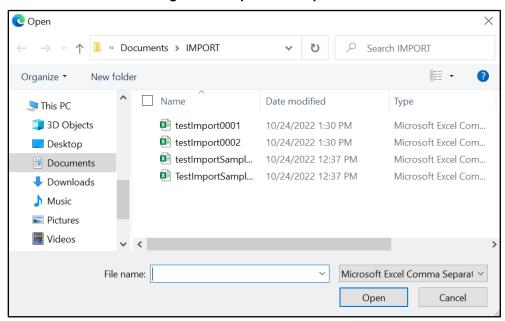
1. From the SEOC Admin home page, select **Import SEOCs**. The **Import SEOCs** dialog box displays.

Figure 17: Import SEOCs Dialog Box



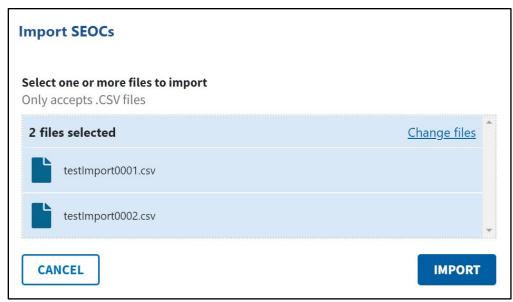
2. To select one or more files, drag and drop the files or select **choose from folder** to open **File Explorer**. It is important to note that SEOC only accepts .CSV files.

Figure 18: Import File Explorer



3. From **File Explorer**, select one or more files to import and select **Open**. The selected files display in the dialog box.

Figure 19: Selected Import SEOCs Dialog Box



**NOTE:** To change the selected files, select **Change Files** to open **File Explorer** and select new files.

4. Select **Import**. A message displays confirming the SEOC import was successfully completed.

Figure 20: SEOC Import Completion Message



5. Select **Close** to return to the SEOC dashboard. To download and save the file report, select **Download Report and Close**.

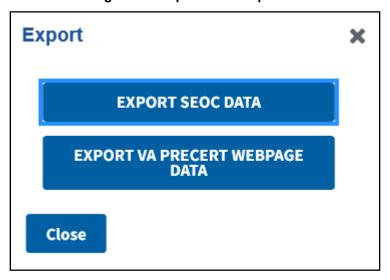
# 4.3. Exporting Data

## 4.3.1. Export the SEOC Data to a JSON File

To export the **SEOC Data**, follow the steps listed below:

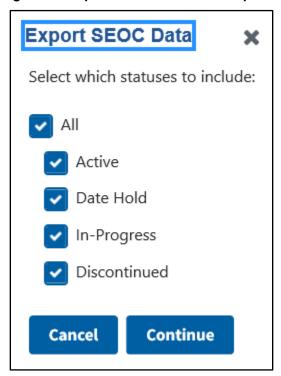
1. As an **Analyst**, **Coder**, **Publisher**, or **Administrator** on the SEOC Admin home page, select **Export**. The **Export SEOC Options** dialog box displays.

Figure 21: Export SEOC Options



2. Select Export SEOC Data. The Export SEOC Data Status options dialog box displays.

Figure 22: Export SEOC Data Status Options



3. Select which status options to include in the export and select **Continue**. The SEOC data will be exported to a JSON file that you will need to save.

**NOTE:** If no SEOCs match the export criteria, the following message will display "No SEOCs found that match your export request, please select different options to export SEOCs.".

**NOTE:** Please refer to Appendix A for additional steps on converting the JSON file into an Excel file.

## 4.3.2. Export the VA PreCert Webpage Data to a JSON File

For all users who can **Export SEOC Data**, the **SEOC Admin UI** also allows them to export the data required for the **VA PreCert Webpage**.

To export the **SEOC PreCert Data**, follow the steps listed below:

1. As an **Analyst**, **Coder**, **Publisher**, or **Administrator** on the SEOC Admin home page, select **Export**. The **Export SEOC Options** dialog box displays.

Figure 23: Export SEOC Options



1. Select Export VA PreCert Webpage Data. The Downloading VA PreCert Webpage Data message displays.

Figure 24: Downloading VA PreCert Webpage Data Message



The SEOC data will be exported to a JSON file that you will need to save. If needed, select **Cancel** on the dialog to cancel the data download.

**NOTE:** Please refer to Appendix A for additional steps on converting the JSON file into an Excel file.

# 4.4. Managing Billing Codes

**NOTE:** When updating the Billing Codes, SEOC will go into maintenance mode. SEOC users will be unable to update the system until the Admin has completed managing the billing codes.

**NOTE:** Maintenance mode can be turned off by any Admin.

**NOTE:** When you select on Return to SEOC list from Billing Code Management, it will automatically turn maintenance mode off.

To manage the billing codes in SEOC, follow the steps listed below:

1. From the SEOC Admin home page, select **Manage**. The **Manage** dialog box displays.

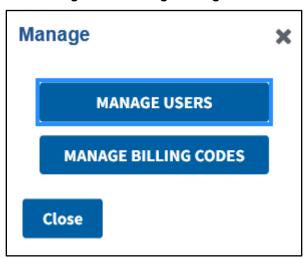


Figure 25: Manage Dialog Box

2. From the **Manage** dialog box, select **Manage Billing Codes**. The **Billing Code Management** window displays.

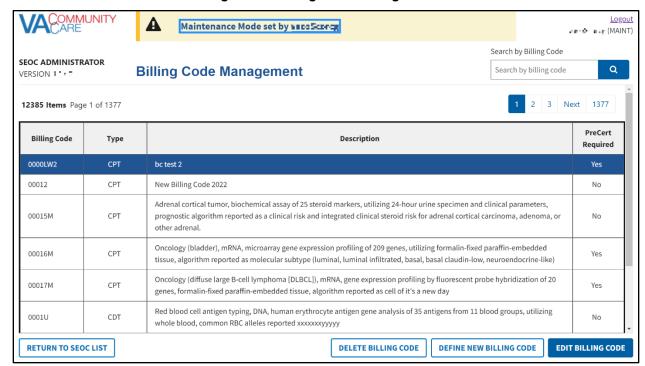


Figure 26: Billing Code Management

NOTE: This will place the application into Maintenance Mode for all users. While Maintenance Mode is active, users will be unable to save SEOC information or navigate to the User Management Page. To exit Maintenance Mode, select Return to SEOC List. If you exit SEOC or time out before exiting Maintenance Mode, when you log back in to SEOC select Turn Off Maintenance Mode.

## 4.4.1. Search for a Billing Code

To search for a **Billing Code**, follow the steps listed below.

1. From the SEOC Admin home page, select **Manage**. The **Manage** dialog box displays.

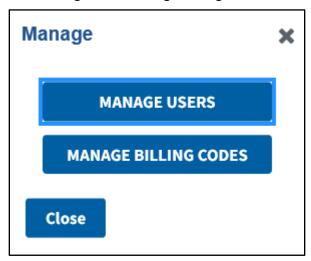
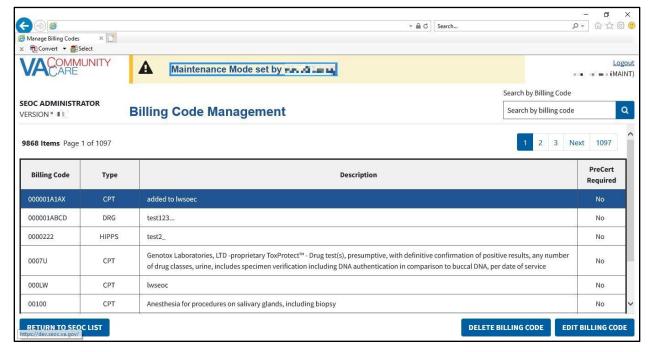


Figure 27: Manage Dialog Box

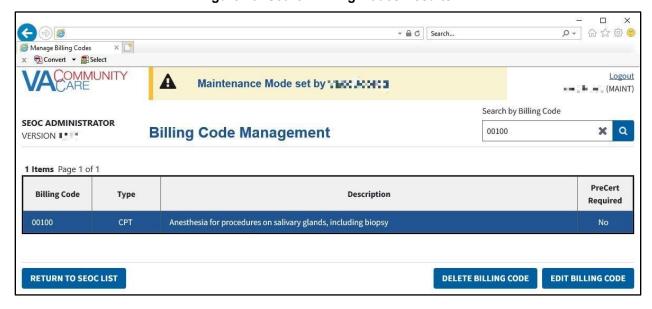
2. From the **Manage** dialog box, select **Manage Billing Codes**. The **Billing Code Management** window displays.

Figure 28: Billing Code Management



- 3. In the **Search by Billing Code** field, enter the billing code to search.
- 4. Press **Enter** or select the **Search** button. The table will display all rows where the **Billing Code** column starts with the text you entered.

Figure 29: Search Billing Codes Results

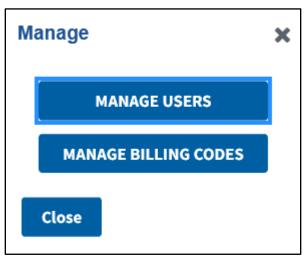


## 4.4.2. Deleting Billing Codes

To delete billing codes in SEOC, follow the steps listed below:

1. From the SEOC Admin home page, select Manage. The Manage dialog box displays.

Figure 30: Manage Dialog Box



2. From the **Manage** dialog box, select **Manage Billing Codes**. The **Billing Code Management** window displays.

a ○ 公 公 ⑩ ◎ → 🗎 🖒 Search... Manage Billing Codes € Convert ▼ 🔠 Select COMMUNITY Logout A Maintenance Mode set by - - - MAINT) Search by Billing Code SEOC ADMINISTRATOR **Billing Code Management** Search by billing code Q VERSION . II 2 3 Next 9868 Items Page 1 of 1097 PreCert **Billing Code** Description Type Required 000001A1AX added to lwsoec CPT 000001ABCD DRG test123... No 0000222 HIPPS

Genotox Laboratories, LTD -proprietary ToxProtect™ - Drug test(s), presumptive, with definitive confirmation of positive results, any number

of drug classes, urine, includes specimen verification including DNA authentication in comparison to buccal DNA, per date of service

Figure 31: Billing Code Management

3. From the list of billing codes, select the code that you would like to delete.

Anesthesia for procedures on salivary glands, including biopsy

4. Select **Delete Billing Code**. The **Confirm Delete Billing Code** dialog box will display showing all the **SEOCs** that will be affected.

CPT

CPT

CPT

0007U

000I W

00100

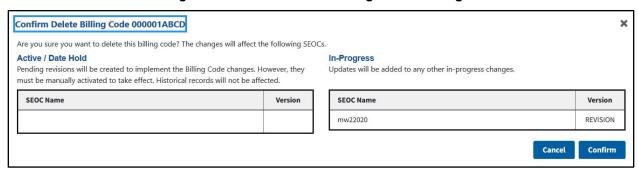
RETURN TO SEOC LIST

No

**EDIT BILLING CODE** 

DELETE BILLING CODE

Figure 32: Confirm Delete Billing Code Message

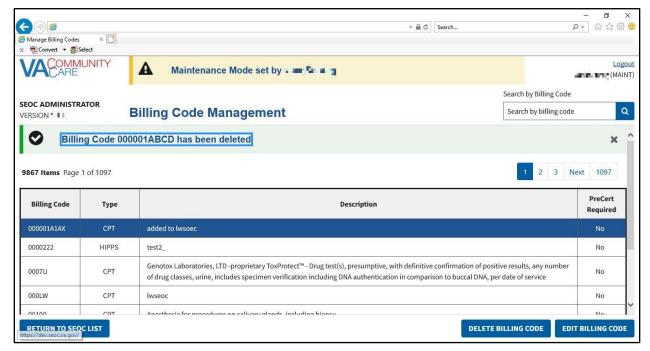


**NOTE:** Verify that you want to delete the billing code listed, as the changes will affect the SEOCs listed in the Active and In-Progress tables.

5. Select **Confirm**. The **Billing Code** will be deleted from the **Billing Codes List**. A message will display confirming that that the billing code was deleted, and the billing code will no longer display in the list.

NOTE: For all affected SEOCs with a status of Active, a Revision will be created with the Billing Code deleted. For all affected SEOCs with a status of In-Progress, whether a New SEOC or a Revision, the Billing Code will be removed. For all affected SEOCs with a status of Date Hold, the SEOC will be reverted to In-Progress and the Billing Code will be removed. Discontinued SEOCs are not affected.

Figure 33: Billing Code Deletion Confirmation Message



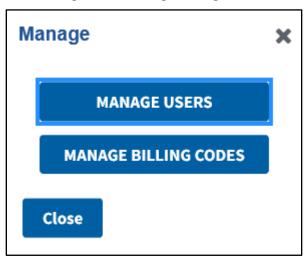
**NOTE:** The confirmation message can be dismissed by selecting the X button.

## 4.4.3. Editing Billing Codes

To manage the billing codes in SEOC, follow the steps listed below:

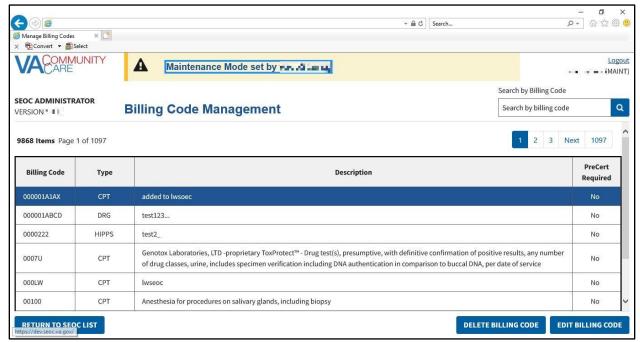
1. From the SEOC Admin home page, select Manage. The Manage dialog box displays.

Figure 34: Manage Dialog Box



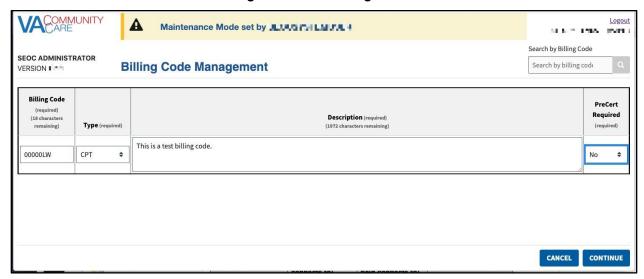
2. From the **Manage** dialog box, select **Manage Billing Codes**. The **Billing Code Management** window displays.

Figure 35: Billing Code Management



- 3. From the list of billing codes, select the code that you would like to edit.
- 4. Select **Edit Billing Code**. The **Edit Billing Code** form displays, populated with the selected **Billing Code** information.

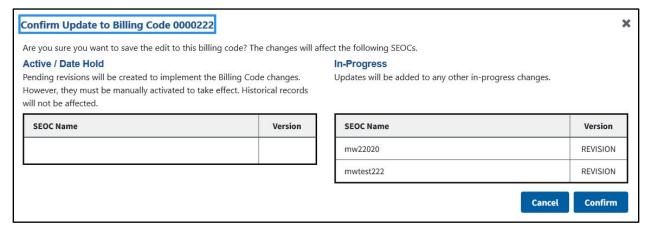
Figure 36: Edit Billing Code



- 5. Update the **Billing Code** field as needed. The maximum number of characters for this field is 25.
- 6. From the Type field, select the correct option: CPT, DRG, HCPCS, HIPPS.
- 7. Update the **Description** field as needed. The maximum number of characters for this field is 2,000.
- 8. From the PreCert Required field, select the correct option: NO or YES.
- 9. Select **Continue**. The **Confirm Update to Billing Code** dialog box will display showing all the **SEOCs** that will be affected.

**NOTE:** If the only change made was to the Billing Code Description, all affected SEOCs will be updated without requiring a revision and the Edit Billing Code Confirmation Message won't display.

Figure 37: Edit Billing Code Confirmation Message

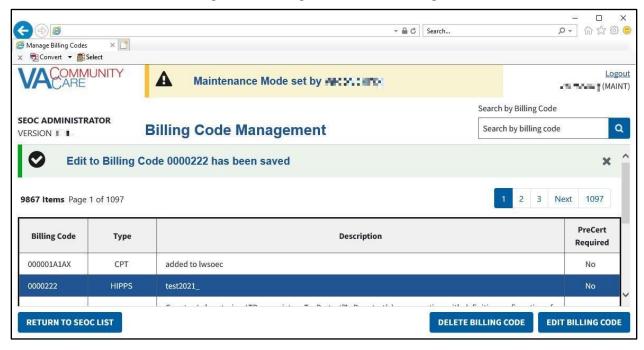


**NOTE:** Verify that you want to update the billing code listed, as the changes will affect the SEOCs listed in the Active and In-Progress tables.

10. Select **Confirm**. The updated **Billing Code** will be displayed in the **Billing Codes List**. A confirmation message will display stating that the edits were made to the billing code.

For all affected SEOCs with a status of Active or Date Hold, a Revision will be *NOTE:* created with the **Billing Code** updated. For all affected **SEOCs** with a status of In-Progress, whether a New SEOC or a Revision, the Billing Code will be updated. **Discontinued SEOCs** are not affected. *NOTE:* If the value of the **Billing Code** column was not changed as part of the update, the change will not be reflected in Track Version Changes. **NOTE:** It is possible to update a **Billing Code** without changing any values. When a Billing Code is updated, the previous version is deactivated, and another Billing Code with the updates is used instead. If no values are updated when a Billing Code is saved, the current Billing Code is deactivated, and another is created with the same values. *NOTE:* If any of the fields are not populated, there are any characters in the **Billing Code** field that are not letters, numbers, a hyphen, or a period, or the **Description** field has a backslash character, an error message will appear when you select **Continue** on the **Edit Billing Code** form. **NOTE:** The error message can be dismissed by selecting the X button.

Figure 38: Billing Code Saved Message



**NOTE:** The confirmation message can be dismissed by selecting the X button.

# 4.5. Editing Disclaimers

**NOTE:** This feature has been disabled per change to business requirements and may be enabled at a future date.

#### 4.5.1. Edit the General Disclaimer

All SEOCs share a common General Disclaimer. In the View SEOC Page, Print SEOC Window, and Edit SEOC: Details page, it is displayed as Disclaimer. Publishers and Administrators can access the Edit Disclaimer page which allows the user to update the General Disclaimer for all SEOCs.

Each **SEOC** also has **Additional Information**, which can be used to provide **SEOC**-specific information in addition to the **General Disclaimer**.

**NOTE:** When the **General Disclaimer** is updated, the change is reflected across all **SEOCs** instantly without updating version numbers or creating new revisions.

**NOTE:** Additional Information is SEOC-specific and requires modifying SEOCs with the usual methods.

To edit the General Disclaimer, follow the steps below:

1. From the SEOC Admin home page, select **Edit Disclaimer**. The **Edit Disclaimer** page will display.

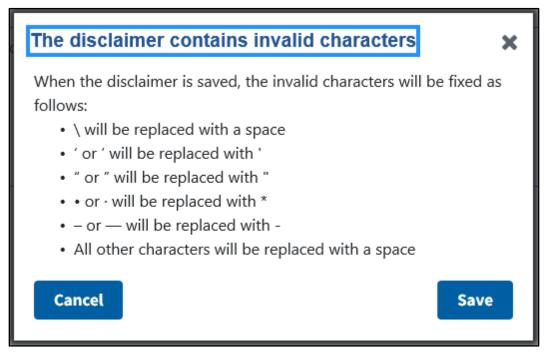
Figure 39: Edit Disclaimer Button





- 2. Make any updates to the **General Disclaimer** as needed.
- 3. Select **Save Disclaimer**. If there are any invalid characters, a dialog will display. For additional information on invalid characters, refer to the Invalid Characters section in this document.

Figure 41: Fix Invalid Characters in General Disclaimer Dialog



- 4. To close the dialog and manually fix the invalid characters, select Cancel.
- 5. To save the **General Disclaimer** and automatically fix the invalid characters, select **Save**. The invalid characters will be fixed as follows:
  - o \ will be replaced with a space
  - o 'or' will be replaced with'
  - o "or" will be replaced with "
  - o or · will be replaced with \*
  - $\circ$  or will be replaced with -
  - o All other characters will be replaced with a space

Regardless of whether there are invalid characters, a confirmation message will display when the **General Disclaimer** has been saved.

O + ♂ Search... x 📑 COMMUNITY Logout NETWORKID (Role) **Edit Disclaimer** VERSION L :-Disclaimer has been saved. × Disclaimer (required, 1874 characters remaining) "This is a quotation. 'This is a quotation within a quotation.'" \* Middle Dot En Dash - hyphen Em Dash - hyphen RETURN TO SEOC LIST SAVE DISCLAIMER

Figure 42: Disclaimer Has Been Saved Message

**NOTE:** The confirmation message can be dismissed by selecting the X button.

6. Select **Return to SEOC** List to navigate back to the SEOC Admin UI home page.

**NOTE:** For the **Edit Disclaimer** page, the **Return to SEOC List** button will not save the **General Disclaimer**.

#### 4.5.2. Deactivate Edit the General Disclaimer

When the description field of the Disclaimer table in the database is set to NULL, the **Edit Disclaimer** page in the SEOC Admin UI will be inaccessible. The **Edit Disclaimer** button on the SEOC Admin UI home page will be disabled, and if the user attempts to navigate directly to the **Edit Disclaimer** page using the browser address bar, they will be redirected back to the SEOC Admin UI home page once the request to fetch the disclaimer is complete. This is similar functionality to what is used to restrict users from accessing pages they do not have the privileges to access.

To reactivate the **Edit Disclaimer** page in the SEOC Admin UI, set the description field of the Disclaimer table in the database to a value other than null.

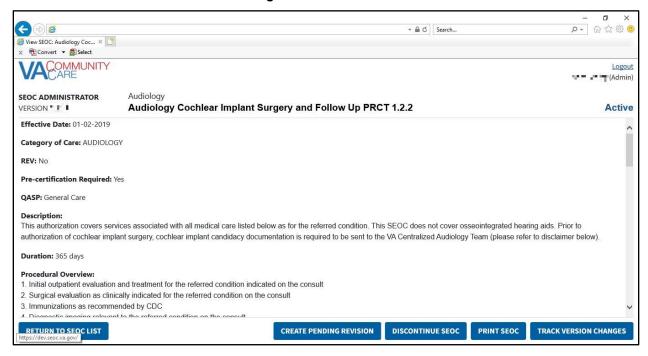
## 4.6. View SEOCs

## 4.6.1. View a Selected SEOC

To view a SEOC from the SEOC list, follow the steps listed below:

- 1. From the SEOC Admin home page, select the SEOC you would like to view.
- 2. Select View Selected SEOC. The View SEOC page displays.

Figure 43: View SEOC



#### 4.6.2. View Filtered SEOCs

## 4.6.2.1. Filter SEOCs by Billing Code

To filter the list of SEOCs by billing code, follow the steps listed below:

1. From the SEOC Admin home page, enter the billing code in the **Filter by Billing Code** field.

Figure 44: Filter by Billing Code Field



2. Select the **Search** button. The SEOC list refreshes to display the SEOCs list filtered by the billing code type.

Logout vestilooec g (Admin) Filter by Billing Code Filter by Service Line Filter by Status Filter by Name (contains) Standardized SEOC ADMINISTRATOR **Episodes of Care** VERSION | T. **17 Items** Page 1 of 2 Effective Service SEOC Name Version **End Date** Line Date IVF Male 11-01-2017 01-02-2019 DISCONTINUED INF IVF Male 1.1.2 01-02-2019 01-22-2019 DISCONTINUED 05-24-2019 07-28-2019 DISCONTINUED INF IVF ART Male 1.5.1 IVF ART Male 1.5.2 07-28-2019 01-24-2020 DISCONTINUED IVF ART Male 1.5.3 01-24-2020 10-01-2020 DISCONTINUED IVF ART Male 1.5.4 10-01-2020 01-04-2021 DISCONTINUED INF IVF ART Male 1.5.5 01-04-2021 03-12-2022 DISCONTINUED IVF ART Female 1.4.1 05-24-2019 07-28-2019 DISCONTINUED INF IVF ART Female 1.4.2 07-28-2019 01-24-2020 DISCONTINUED IMPORT SEOCS **EXPORT** MANAGE **VIEW SELECTED SEOC DRAFT NEW SEOC** 

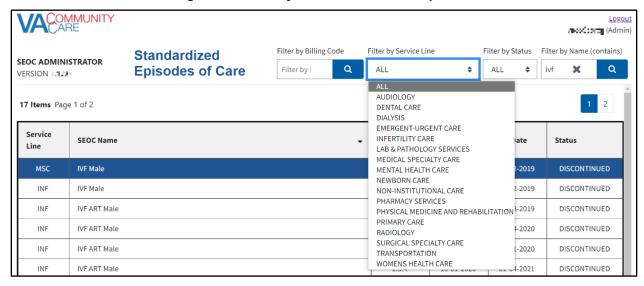
Figure 45: Filter by Billing Code Search Results

#### 4.6.2.2. Filter SEOCs by Service Line

To filter the list of SEOCs by Service Line, follow the steps listed below:

1. From the SEOC Admin home page, select **Filter by Service Line** menu.

Figure 46: Filter by Service Line Menu Options



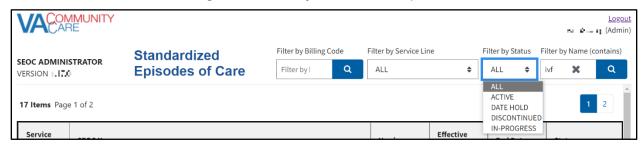
2. From the list of options, select one of the service line types to filter by. The SEOC list refreshes to display the SEOCs list filtered by the selected service line type.

## 4.6.2.3. Filter SEOCs by Status

To filter the list of SEOCs by status, follow the steps listed below:

1. From the SEOC Admin home page, select Filter By Status menu.

Figure 47: Filter by Status Menu Options



2. From the list of options, select to filter by: All, Active, Date Hold, Discontinued, or In-Progress. The SEOC list refreshes to display the status filtered by.

## 4.6.2.4. Filter SEOCs by Name

To filter a SEOC by name, follow the steps listed below:

1. From the SEOC Admin home page, enter the name of the SEOC in the **Filter by Name** (contains) field.

Figure 48: Filter by Name Field



2. Select the **Search** button. The **Search SEOC Results** displays.

Logout . . . . . . . . (Admin) Filter by Billing Code Filter by Service Line Filter by Status Filter by Name (contains) Standardized SEOC ADMINISTRATOR Q **Episodes of Care** Filter by I VERSION | **17 Items** Page 1 of 2 Effective Service SEOC Name Version **End Date** Line Date 01-22-2019 DISCONTINUED ART-IVF Female 01-02-2019 INF ART-IVF Female 1.0.1 11-01-2017 01-02-2019 DISCONTINUED 01-04-2021 ACTIVE INF Cryopreservation Storage for IVF-ART 1.6.3 DISCONTINUED Cryopreservation Storage for IVF-ART 1.6.2 10-01-2020 01-04-2021 IVF ART Female 1.4.5 01-04-2021 ACTIVE INF IVF ART Female 1.4.4 10-01-2020 01-04-2021 DISCONTINUED INF IVF ART Female 1.4.3 01-24-2020 10-01-2020 DISCONTINUED IVF ART Female 1.4.2 07-28-2019 01-24-2020 DISCONTINUED INF IVF ART Female 1.4.1 05-24-2019 07-28-2019 DISCONTINUED IMPORT SEOCS **EXPORT** MANAGE **VIEW SELECTED SEOC DRAFT NEW SEOC** 

Figure 49: Filter by Name Search Results

## 4.6.2.4.1. Sort SEOCs Alphabetically by Name

To sort the list of SEOCs alphabetically by name, follow the steps listed below:

1. From the SEOC Admin home page, select the **SEOC Name Column Heading**. This will sort the list of **SEOCs** in alphabetical order by name.



Figure 50: SEOC Name Column Heading

35

OMMUNITY Logout (Admin) Filter by Billing Code Filter by Service Line Filter by Status Filter by Name (contains) **Standardized** SEOC ADMINISTRATOR Filter by I **Episodes of Care** VERSION " ! • " **17 Items** Page 1 of 2 Effective Service SEOC Name Version **End Date** Line Date DISCONTINUED ART-IVF Female 11-01-2017 01-02-2019 INF ART-IVF Female 1.0.2 01-02-2019 01-22-2019 DISCONTINUED 07-23-2020 10-01-2020 DISCONTINUED MSC Cryopreservation Storage for IVF-ART 1.8.1 01-04-2021 DISCONTINUED Cryopreservation Storage for IVF-ART 1.6.2 10-01-2020 Cryopreservation Storage for IVF-ART 1.6.3 01-04-2021 INF IVF ART Female 1.4.1 05-24-2019 07-28-2019 DISCONTINUED INF IVF ART Female 1.4.2 07-28-2019 01-24-2020 DISCONTINUED IVF ART Female 1.4.3 01-24-2020 10-01-2020 DISCONTINUED

Figure 51: SEOC List Sorted in Alphabetical Order by Name

2. To sort the list of **SEOCs** in reverse alphabetical order, select the **SEOC Name Column Heading** again.

1.4.4

10-01-2020

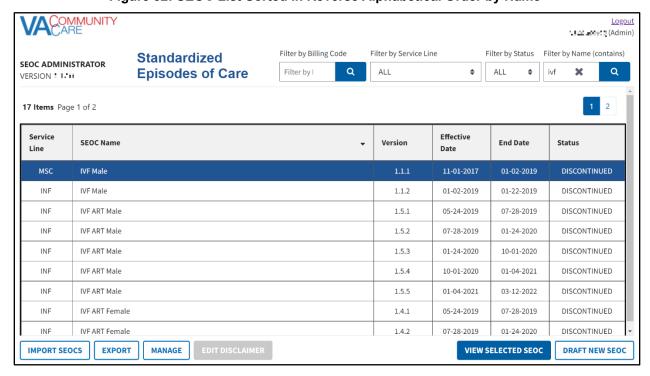
01-04-2021

**VIEW SELECTED SEOC** 

DISCONTINUED

DRAFT NEW SEOC

Figure 52: SEOC List Sorted in Reverse Alphabetical Order by Name



36

INF

IMPORT SEOCS

IVF ART Female

**EXPORT** 

MANAGE

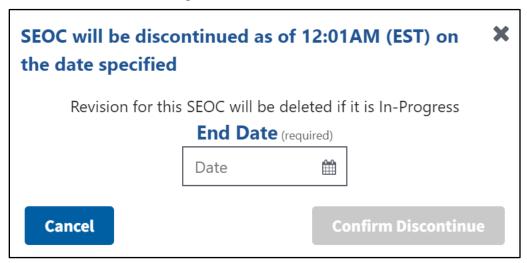
**NOTE:** To return to the default sort order, either refresh the page or select the logo in the upper-right-hand corner of the page.

## 4.6.3. Discontinue a SEOC

To discontinue an Active SEOC, follow the steps listed below:

- 1. From the SEOC Admin home page, select the Active SEOC you would like to discontinue.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select **Discontinue SEOC**. The **Discontinue SEOC** dialog box displays.

Figure 53: Discontinue SEOC



4. In the **End Date** field, enter or select the calendar icon to select a date. The SEOC will be discontinued as of 12:01 AM EST on the date specified.

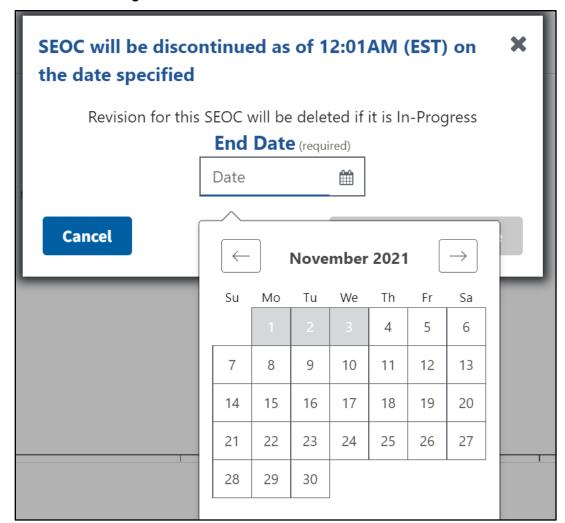


Figure 54: SEOC Discontinue Confirmation Calendar

5. Select **Confirm Discontinue**. The **View SEOC** page displays confirming the specified discontinuation date.

Logout 🕶 🕶 😘 (Admin) SEOC ADMINISTRATOR Audiology Testtest123 1.5.2 **Active** SEOC will be discontinued on 11-30-2021 × Effective Date: 08-20-2021 End Date: 11-30-2021 Category of Care: AUDIOLOGY REV: No Pre-certification Required: Yes QASP: Complementary & Integrative HC Services This authorization covers services associated with all medical care listed below for the referred condition indicated on the consult Duration: 11 days Procedural Overview: Disclaimer: **Provider Taxonomy Codes:** 

Figure 55: Discontinued Status

## 4.6.3.1. Change Discontinue Date

**RETURN TO SEOC LIST** 

To change the discontinue date for an Active SEOC, follow the steps listed below:

1. From the SEOC Admin home page, select the Active SEOC that is scheduled to be discontinued.

CHANGE DISCONTINUE DATE

PRINT SEOC

TRACK VERSION CHANGES

- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select Change Discontinue SEOC. The Change Discontinue SEOC dialog box displays.

Figure 56: Change Discontinue SEOC



4. In the **End Date** field, enter or select the calendar icon to select a date. The SEOC will be discontinued as of 12:01 AM EST on the date specified.

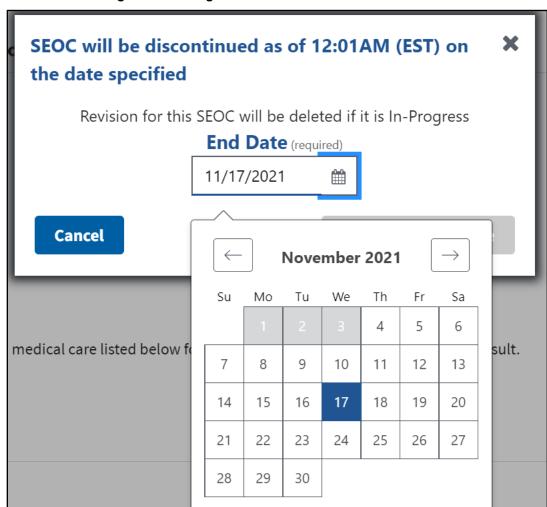
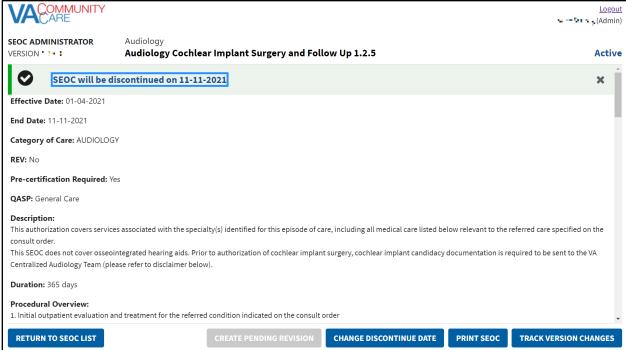


Figure 57: Change Discontinue Confirmation Calendar

5. Select **Confirm Discontinue**. The **View SEOC** page displays with the updated discontinue date of the SEOC.

Figure 58: Discontinue SEOC Status



#### 4.6.3.2. Reactivate Discontinued SEOC

To reactivate a SEOC that was discontinued, follow the steps listed below:

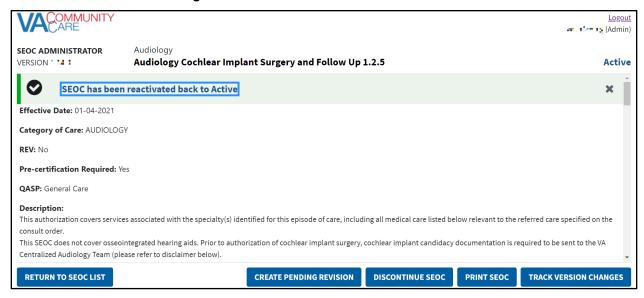
- 1. From the SEOC Admin home page, select the Discontinued SEOC that needs to be reactivated.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select Reactivate SEOC. The Reactivate SEOC to Active Confirmation Message displays.

Figure 59: Reactivate SEOC to Active Confirmation Message



4. Select **Confirm**. The **View SEOC** page displays with the reactivated to Active status.

Figure 60: Reactivated Back to Active Status



#### 4.6.4. Print a SEOC

To print a SEOC, follow the steps listed below:

- 1. From the SEOC Admin home page, select the SEOC you would like to print.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select **Print SEOC**. The printed SEOC will display in another window. Print or save using local browser capabilities.

Figure 61: Printed SEOC Window (1 of 2)

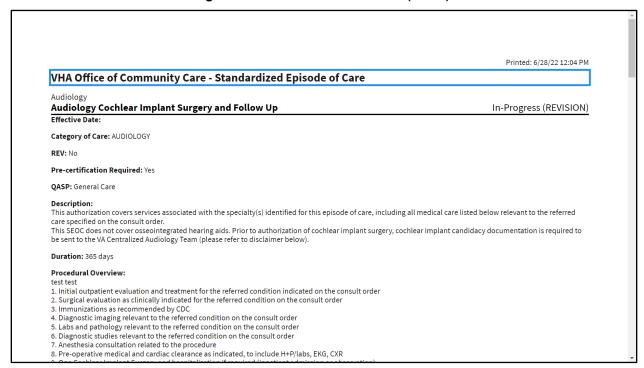


Figure 62: Printed SEOC (2 of 2)

#### Disclaimer: Additional Information: Please visit the VHA Storefront www.va.gov/COMMUNITYCARE/providers/index.asp for additional resources and requirements pertaining to the following \* Pharmacy prescribing requirements \* Durable Medical Equipment (DME), Prosthetics, and Orthotics prescribing requirements \* Precertification (PRCT) process requirements \* Request for Services (RFS) requirements Provider Taxonomy Codes: HPTC Classification Specialization 207Y00000X Otolaryngology Allopathic & Osteopathic Physicians **Payable Services:** Line Item **Clinical Service** Visits/Units Frequency Description **Billing Codes** Initial outpatient evaluation and 99202, 99203, 99204, 99205, 99211, 99212, 99213, 99214, treatment for the referred 04-Otolaryngology N/A condition indicated on the consult 99215, G0463, G0466, G0467, G0468 99202, 99203, 99204, 99205, Surgical evaluation as clinically 99211, 99212, 99213, 99214, 2 04-Otolaryngology 999 N/A indicated for the referred 99215, G0463, G0466, G0467, condition on the consult order G0468 Immunizations as recommended 04-Otolarvngology 999 N/A 90670, 90732, G0009 by CDC

#### 4.6.5. Invalid Characters

30-Diagnostic

The following business rules for valid characters are enforced in the SEOC Admin UI:

N/A

- For the **Description**, **Procedural Overview**, and **Additional Information** fields in a **SEOC**, and the **Description** field in a **Payable Service**, the following characters are accepted:
  - o Line Feed (ASCII 10)
  - o Carriage Return (ASCII 13)
  - The printable ASCII characters (ASCII 32 126) except the DELETE character (ASCII 127)

Diagnostic imaging relevant to the

referred condition on the consult

 $70120, 70130, 70134, \underline{70480}, \underline{70481}$ 

- For the **SEOC Name**, the above characters are accepted except:
  - o & Ampersand (ASCII 38)
  - o / Slash (ASCII 47)
  - o : Colon (ASCII 58)
  - \ Backslash (ASCII 92)
  - ^ Caret (ASCII 94)
  - o | Vertical Bar (ASCII 124)
  - $\circ$  ~ Tilde (ASCII 126)
- For a **Billing Code** value, the following characters are accepted:
  - o Letters
  - Numbers
  - o Hyphen (ASCII 45)

- o . Period (ASCII 46)
- o €¥€β

The user will not be able to activate a SEOC unless all these rules have been followed. In the case of the SEOC Name, the user will be unable to navigate past the SEOC Name and Service Line page of the Create / Edit SEOC Workflow if the SEOC Name has invalid characters. For Billing Codes, the user will be unable to save the Billing Code if the Billing Code value has invalid characters.

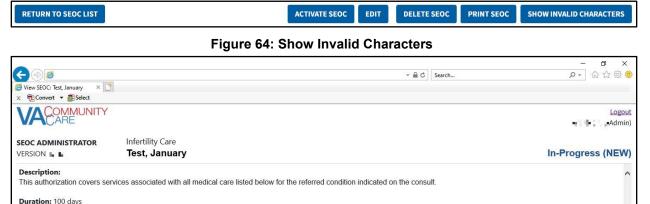
The **Show Invalid Characters** feature allows the user to highlight invalid characters on any SEOC, regardless of status.

#### 4.6.5.1. Show Invalid Characters

To show invalid characters on a SEOC, follow the steps listed below:

- 1. From the SEOC Admin home page, select a **SEOC** with invalid characters.
- 2. Select View Selected SEOC, the View SEOC page will display.
- 3. Select **Show Invalid Characters**. The **Show Invalid Characters** page will display.

Figure 63: Show Invalid Characters Button





4. To print the **SEOC** with invalid characters shown, select **Print SEOC**. The **Print SEOC** page will display with invalid characters shown.

Procedural Overview: fgadf~@#\$%^&\*(>`§£

Additional Information:

This field has a maximum of 2000 characters

Figure 65: Print SEOC from Show Invalid Characters Page



5. To return to the **View SEOC** page from the **Show Invalid Characters** page, select the **Hide Invalid Characters** button.

Figure 66: Hide Invalid Characters Button



**NOTE:** The **Show Invalid Characters** button is only available if the SEOC has invalid characters.

#### 4.6.5.1.1.Fix Invalid Characters

Invalid characters in a **SEOC** can either be fixed manually through the **Edit SEOC** workflow, or automatically with the **Fix Invalid Characters** feature. Invalid characters are fixed as follows:

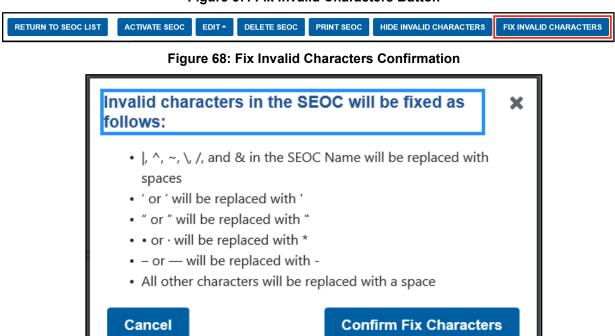
- $|, ^{\land}, \sim, \setminus, /$ , and & in the SEOC Name will be replaced with spaces
- 'or' will be replaced with'
- " or " will be replaced with "
- or · will be replaced with \*
- - or will be replaced with -
- All other characters will be replaced with a space

To automatically **Fix Invalid Characters**, follow the steps listed below:

- 1. From the SEOC Admin home page, select a **SEOC** with invalid characters.
- 2. Select View Selected SEOC, the View SEOC page will display.
- 3. Select Show Invalid Characters. The Show Invalid Characters page will display.

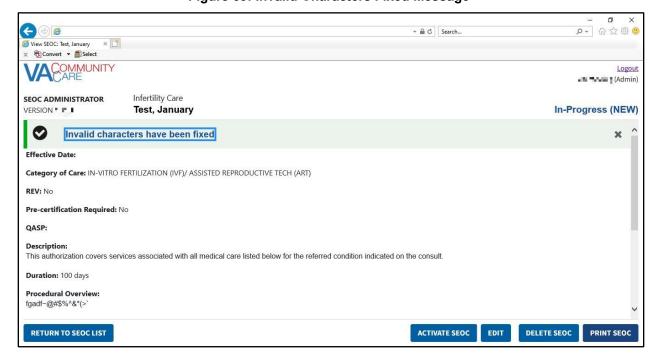
4. Select **Fix Invalid Characters**. The **Fix Invalid Characters** confirmation dialog will display.

Figure 67: Fix Invalid Characters Button



5. Select Confirm Fix Characters. A confirmation message will display.

Figure 69: Invalid Characters Fixed Message



**NOTE:** This feature is only available for **In-Progress SEOCs**. For **Active SEOCs** with invalid characters, create a **Pending Revision**, then fix the invalid characters.

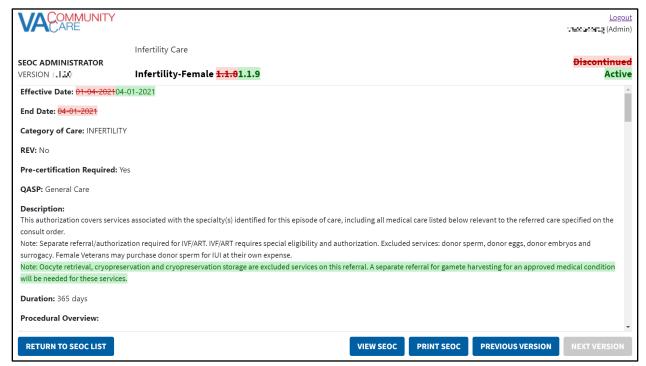
**NOTE:** The confirmation message can be dismissed by selecting the X button.

# 4.6.6. Track Version Changes

To track the version changes of a SEOC, follow the steps listed below:

- 1. From the SEOC Admin home page, select a **SEOC** with a previous version.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select the **Track Version Changes** button when it becomes active. The **Track Version Changes** page will display.

Figure 70: Track Version Changes Page (1 of 3)



Logout (Admin) Infertility Care SEOC ADMINISTRATOR VERSION . CO Infertility-Female 1.1.81.1.9 Active Additional Description for Procedural Overview: Initial outpatient evaluation and treatment for infertility as indicated on the consult order NOTE: This SEOC is not for embryo transfer, fertilization, embryo cryopreservation or storage. These services require alternative SEOCs through a separate authorization. 2. Diagnostic imaging relevant to the referred condition on the consult order 3. Lab and pathology services relevant to the referred condition on the consult order 4. Diagnostic studies relevant to the referred condition on the consult order 5. Procedures including but not limited to: ovarian stimulation, correction of a structural defect preventing successful pregnancy, Tubal 6. Anesthesia consultation per the referred condition indicated on the consult order 7. Pre-operative medical and cardiac clearance as indicated (including H+P/labs, EKG, CXR, echo) 8. Inpatient or observation admission for surgical procedure and/or surgery, if indicated, 9. and inpatient or observation admission for surgical procedure and/or surgery, if indicated, 9. and inpatient or observation admission for surgical procedure and/or surgery, if indicated, 9. and inpatient or observation admission for surgery and input indicated, 9. and 9. <del>observation admission</del> for complications <mark>per</mark>related to the <del>referred</del>procedure <del>conditio</del> <del>icated</del>surgery \*\* Notify the referring VA of admission status to initiate and facilitate care coordination and discharge planning 109. Intrauterine insemination (IUI) Note: Maximum of six (6) ovulatory cycles per pregnancy. Additional treatment cycles would require additional authorizations Note: Female Veterans may purchase donor sperm for IUI at their own expense 1110. Cryopreservation techniques for medically indicated conditions 12. Follow-up visits for this episode of care as clinically indicated

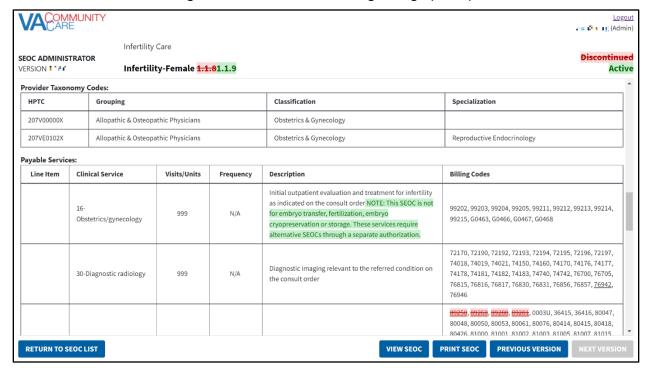
Figure 71: Track Version Changes Page (2 of 3)

Figure 72: Track Version Changes Page (3 of 3)

VIEW SEOC

PRINT SEOC

PREVIOUS VERSION

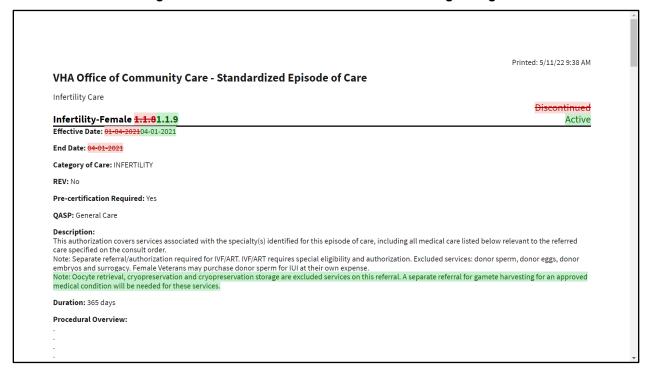


- 4. Select the **Previous Version** button. The changes for the previous version will be shown. If the previous version is the first version of this **SEOC**, no changes will be displayed.
- 5. Select the **Next Version** button. The changes for the next version will be shown.

Additional Information

6. Select the **Print SEOC** button. The **Print SEOC** page will display with the current changes.

Figure 73: Print SEOC from Track Version Changes Page



NOTE: By default, IE11 will not print the red and green background colors. To print the red and green background colors, check the **Print Background Colors and Images** box in the **Page Setup** dialog from the **Print** menu.

# 4.7. Draft a New SEOC

To draft a new SEOC, follow the steps listed below:

**NOTE:** To save your work in-progress, select **Save** at the bottom of the page.

1. From the SEOC Admin home page, select **Draft New SEOC**. The **Draft SEOC**: **Name and Service Line** window displays.

Figure 74: Draft SEOC: Name and Service Line

NOTE: Draft New SEOC only applies to the first page in the Create/Edit SEOC workflow. When you navigate to any other page, it will save the SEOC, and thereafter the workflow will be presented as an edit to an existing SEOC.

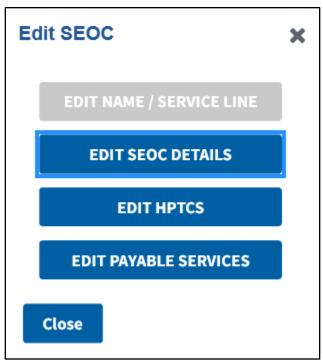
NOTE: To return to the SEOC Admin home page while creating a New SEOC, select Return to SEOC List in the bottom left-hand corner of any page in the Create/Edit SEOC workflow. It will not save your changes to the New SEOC.

- 2. In the **SEOC Name** field, enter the name for the new SEOC (required field). The maximum number of characters for this field is 80.
- 3. From the **Service Line** menu, select a service line (required field).

NOTE: If either the SEOC Name or Service Line are not populated, an error will display when you select Add/Edit SEOC Details.
NOTE: If the SEOC Name is already being used by another SEOC, an error will display when you select Add/Edit SEOC Details. It is not case-sensitive, and it does not take extra spaces into account.
NOTE: The error message can be dismissed by selecting the X button.

4. Select **Edit**. The **Edit SEOC** dialog box displays.

Figure 75: Edit SEOC Dialog Box



NOTE: The option in the Edit SEOC dialog box for the current page will be disabled. For instance, in the screenshot above, this is the Edit Name / Service Line page, so that option is disabled, but in any other page in the workflow, it will be available.

**NOTE:** For the purposes of this document, the steps will go through all pages of the **Edit SEOC** workflow in sequential order, though this is not required in the application.

5. Select **Edit SEOC Details** from the **Edit SEOC** dialog box. The **Edit SEOC: Details** page will display.

Figure 76: Edit SEOC: Details (1 of 2)

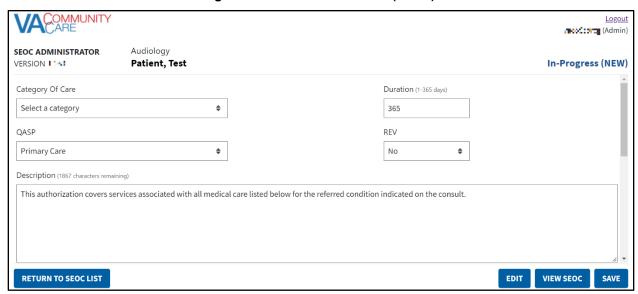
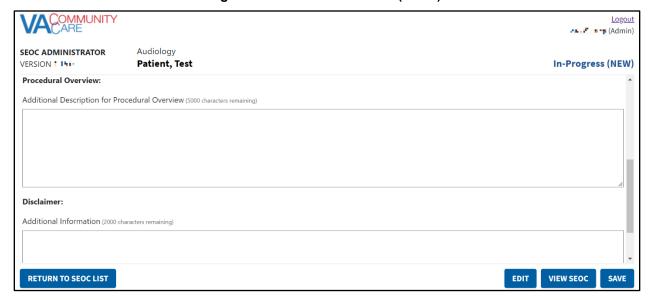


Figure 77: Edit SEOC: Details (2 of 2)



- 6. From the Category of Care drop-down menu, select the Category of Care.
- 7. In the **Duration (days)** field, enter the duration. Minimum number of days being one and maximum number of days being 365.

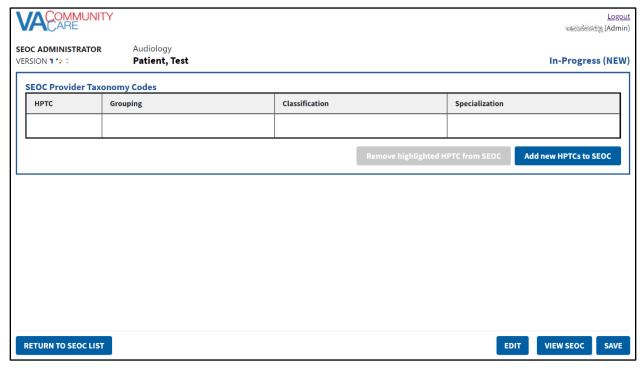
NOTE: If the value of **Duration** is not a number between 1 and 365, an error will be displayed if you select **Return to SEOC List** or **View SEOC**, or if you navigate using the **Edit Menu**.

NOTE: The error message can be dismissed by selecting the X button.

- 8. From the **QASP** drop-down menu, select the **QASP**.
- 9. From the **REV** drop-down menu, select **Yes** or **No**.

- NOTE: To activate a SEOC, the REV flag can only be true if at least one Payable Service has a Billing Code that requires Pre-Certification or is set to Any Code Accepted or No Code Required.
- 10. In the **Description** field, enter a description for the procedure. The maximum number of characters for this field is 2000.
  - **NOTE:** The **Procedural Overview** field is auto-populated based on the Payable Services.
- 11. In the **Additional Description for Procedural Overview** field, enter additional information. The maximum number of characters for this field is 5000.
  - **NOTE:** The **Disclaimer** field refers to the **General Disclaimer** which is shared across all **SEOCs**. To update the **General Disclaimer**, use the **Edit Disclaimer** functionality.
- 12. In the **Additional Information** field, enter additional information regarding the procedure if desired. The maximum number of characters for this field is 2000.
- 13. Select Edit HPTCs from the Edit menu. The Edit SEOC: SEOC Provider Taxonomy Codes page displays.

Figure 78: Edit SEOC: Provider Taxonomy Codes



14. Select Add new HPTCs to SEOC. The Edit SEOC: Add Provider Taxonomy Codes page will display.

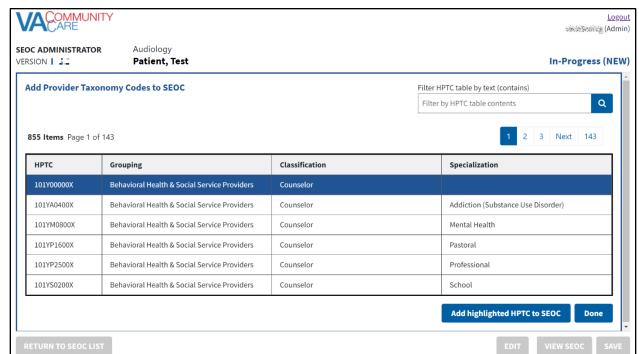


Figure 79: Edit SEOC: Add Provider Taxonomy Codes

**NOTE:** The navigation buttons in the footer will be disabled while this page is displayed. To enable the navigation buttons, select the **Done** button to return to the previous page.

- 15. Enter text in the **Filter HPTC table by text** field. Press **Enter** or select the **Search** button. The table displays all rows with the text you entered in any of the four columns: **HPTC**, **Grouping**, **Classification**, or **Specialization**.
- 16. Select a Provider Taxonomy Code (HPTC).
- 17. Select Add Highlighted HPTC to SEOC. A confirmation message will display.

Logout (Admin) SEOC ADMINISTRATOR Audiology Patient, Test In-Progress (NEW) HPTC 2355A2700X added to SEOC × Add Provider Taxonomy Codes to SEOC Filter HPTC table by text (contains) x Q audiology 1 Items Page 1 of 1 Classification НРТС Grouping Specialization Speech, Language and Hearing Service 2355A2700X Specialist/Technologist Audiology Assistant Providers Add highlighted HPTC to SEOC

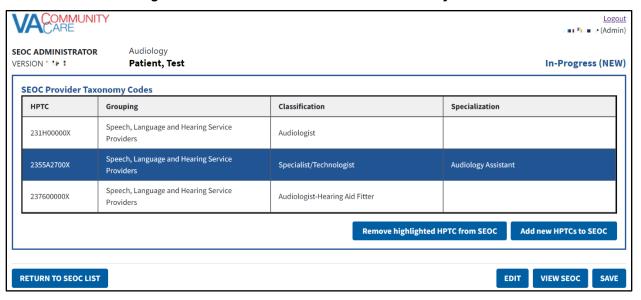
Figure 80: Edit SEOC: Provider Taxonomy Code Added Message

**NOTE:** The confirmation message can be dismissed by selecting the X button.

NOTE: If the selected HPTC has already been added to the SEOC, an error dialog will display when you select Add highlighted HPTC to SEOC.

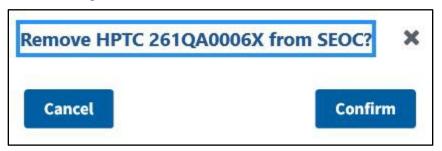
- 18. Repeat steps 16-18 to add additional **HPTCs** to the **SEOC**.
- 19. When you are finished adding provider codes, select **Done**. The **Edit SEOC**: **SEOC Provider Taxonomy Codes** page will display. The table displays the provider codes you added on the previous page.

Figure 81: Edit SEOC: Added Provider Taxonomy Codes



20. If needed, you can select an HPTC row and select **Remove highlighted HPTC from SEOC** to remove an HTPC. The **Confirm Remove HPTC** dialog will display.

Figure 82: Edit SEOC: Confirm Remove HPTC



21. Select **Confirm** to remove the **HPTC** from the **SEOC**. A confirmation message will display.

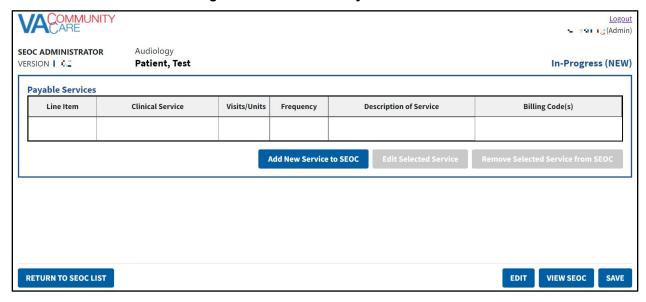
MMUNITY RE <u>Logout</u> (Admin) Audiology SEOC ADMINISTRATOR VERSION | :== Patient, Test In-Progress (NEW) HPTC 2355A2700X has been removed × **SEOC Provider Taxonomy Codes** Grouping Classification Specialization Add new HPTCs to SEOC RETURN TO SEOC LIST EDIT VIEW SEOC

Figure 83: Edit SEOC: Provider HPTC Removed Message

**NOTE:** The confirmation message can be dismissed by selecting the X button.

22. Select Edit SEOC Payable Services from the Edit Menu. The Edit SEOC: Payable Services page will display.

Figure 84: Edit SEOC: Payable Services



23. Select Add New Service to SEOC. The Edit SEOC: Add Payable Service section displays at the top of the page.

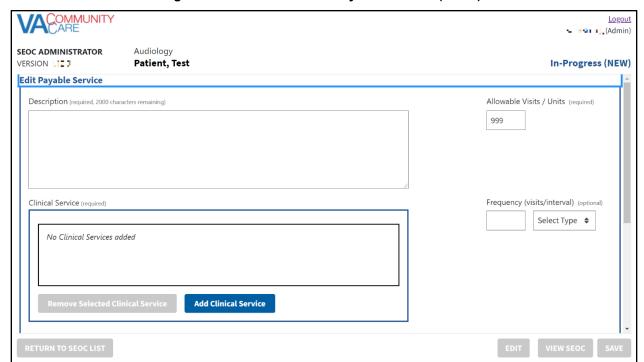
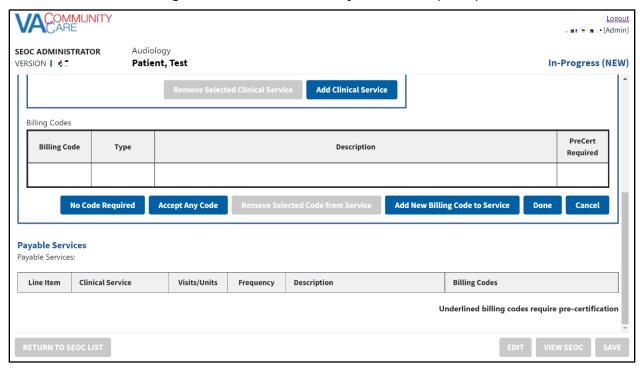


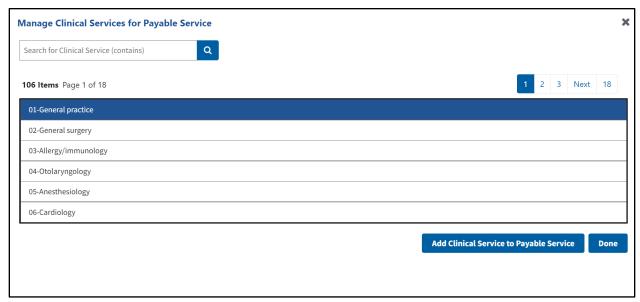
Figure 85: Edit SEOC: Edit Payable Service (1 of 2)

Figure 86: Edit SEOC: Edit Payable Service (2 of 2)



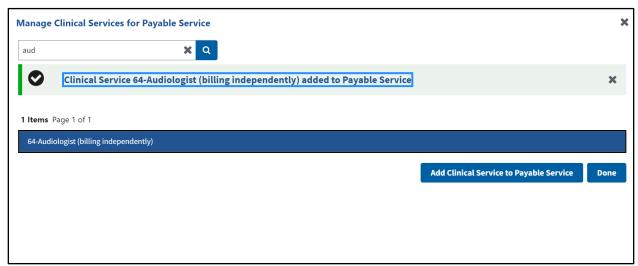
- 24. In the **Description** field, which is required, enter a description for the payable service. The maximum number of characters for the **Description** field is 2000.
- 25. Under Clinical Services, which are required, select Add Clinical Service. The Edit SEOC: Add Clinical Service dialog box will display.

Figure 87: Edit SEOC: Add Clinical Service



- 26. Enter text in the **Search for Clinical Service** field. Press **Enter** or select the **Search** button. The table displays all rows with the text you entered.
- 27. Select the desired Clinical Service.
- 28. Select Add Clinical Service to Payable Service. A confirmation message will display.

Figure 88: Edit SEOC: Clinical Service Added Message



- **NOTE:** If a **Clinical Service** is already associated with the **Payable Service**, an error message will display.
- **NOTE:** Both the confirmation message and the error message can be dismissed by selecting the X button.
- 29. Repeat steps 27-29 to add additional Clinical Services to the Payable Service.
- 30. Select Done. The Edit SEOC: Add Payable Service section will display.

Figure 89: Edit SEOC: New Clinical Services added to the Payable Service



31. If needed, select a **Clinical Service** row, and select **Remove Selected Clinical Service** to remove a **Clinical Service**. A confirmation message will display.

Figure 90: Edit SEOC: Clinical Service Removed Message



*NOTE:* The confirmation message can be dismissed by selecting the *X* button.

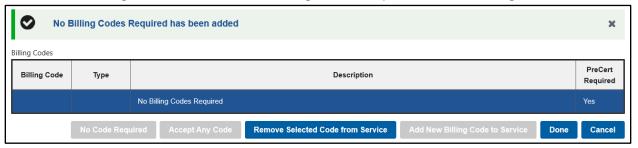
- 32. In the **Allowable Visits** / **Units** field, which is optional, enter the number of allowed visits or other units. The maximum value for the **Allowable Visits** / **Units** field is 99,999.
- 33. In the **Frequency (visits/interval)** fields, which are optional, enter the frequency of visits and select if it is per week, month, or year.

**NOTE:** If either the **Frequency Visits** or the **Frequency Interval** field is populated without the other, an error will be displayed if you select **Done**.

*NOTE:* The error message can be dismissed by selecting the *X* button.

34. If this service does not require billing codes, select **No Code Required**. A confirmation message will display.

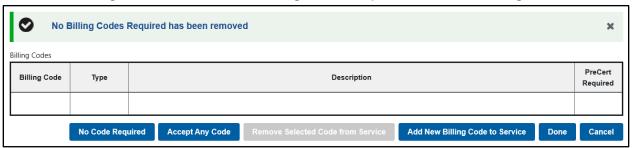
Figure 91: Edit SEOC: No Billing Codes Required Added Message



*NOTE:* The confirmation message can be dismissed by selecting the *X* button.

35. If you need to remove this and select something else, select **Remove Selected Code from Service**. A confirmation message will display.

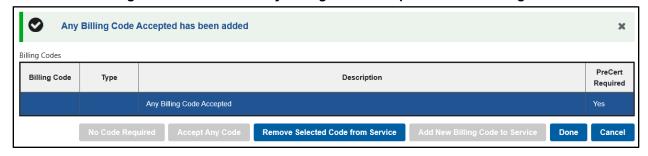
Figure 92: Edit SEOC: No Billing Codes Required Removed Message



*NOTE:* The confirmation message can be dismissed by selecting the *X* button.

36. If this service can accept any billing code, select **Accept Any Code**. A confirmation message will display.

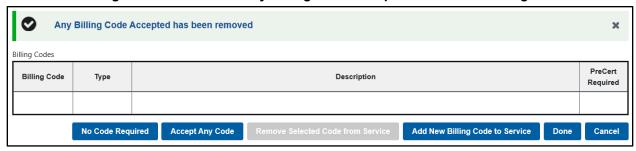
Figure 93: Edit SEOC: Any Billing Code Accepted Added Message



**NOTE:** The confirmation message can be dismissed by selecting the X button.

37. If you need to remove this and select something else, select **Remove Selected Code from Service**. A confirmation message will display.

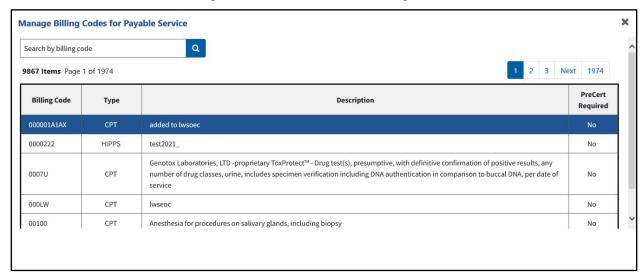
Figure 94: Edit SEOC: Any Billing Code Accepted Removed Message



*NOTE:* The confirmation message can be dismissed by selecting the *X* button.

38. If this service requires billing codes, select **Add New Billing Code to Service**. The **Edit SEOC: Add Billing Code** dialog box will display.

Figure 95: Edit SEOC: Add Billing Code



- 39. Enter text in the **Search by billing code** field. Press **Enter** or select the **Search** button. The table will display all rows where the **Billing Code** column starts with the text you entered.
- 40. Select the desired **Billing Code**.
- 41. Select Add Code to Payable Service. A confirmation message will display.

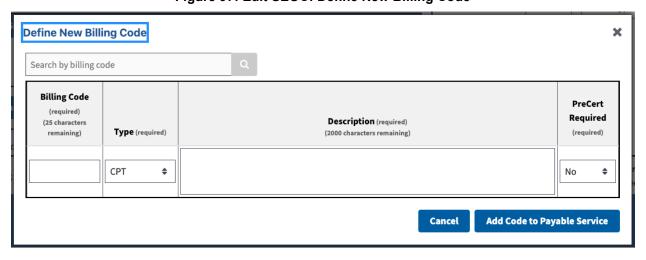
**Manage Billing Codes for Payable Service** × Search by billing code Billing code 00124 added to Payable Service 1 Previous 4 Next 2476 **12379 Items** Page 4 of 2476 PreCert **Billing Code** Description Required Anesthesia for procedures on external, middle, and inner ear including biopsy; otoscopy 00124 СРТ 00126 СРТ Anesthesia for procedures on external, middle, and inner ear including biopsy; tympanotomy Germline disorders, gene rearrangement detection by whole genome next-generation sequencing, DNA, whole blood, 0012U CPT No report of specific gene rearrangement(s) Oncology (solid organ neoplasia), gene rearrangement detection by whole genome next-generation sequencing, DNA, fresh 0013U CPT No or frozen tissue or cells, report of specific gene rearrangement(s) 00140 CPT Anesthesia for procedures on eve; not otherwise specified No Add Code to Payable Service **Define New Code** Done

Figure 96: Edit SEOC: Billing Code Added Message

**NOTE:** The confirmation message can be dismissed by selecting the X button.

- 42. Repeat steps 40-42 to add additional Billing Codes to the Payable Service.
- 43. To define a new **Billing Code**, select **Define New Code**. The **Define New Billing Code** form will display.

Figure 97: Edit SEOC: Define New Billing Code



**NOTE:** If you had entered a billing code in the **Search by Billing Code Field** before selecting **Define New Code**, the **Billing Code Field** will be pre-populated with

the value from the Search by Billing Code Field.

**NOTE:** If the pre-populated value for the **Billing Code Field** starts with a letter, the **Type** menu will default to **DRG**. Otherwise, it will default to **CPT**.

44. In the **Billing Code** field, which is required, enter the billing code.

**NOTE:** The maximum number of characters for the **Billing Code** field is 25.

- 45. From the **Type** menu, select the type of billing code (required field).
- 46. In the **Description** field, which is required, enter the billing code description.

**NOTE:** The maximum number of characters for the **Description** field is 2000.

- 47. From the **PreCert Required** menu, select whether the billing code requires precertification (required field).
- 48. Select **Add Code to Payable Service**. The new code will be added to the current payable service. A confirmation message will display. It will also be available in the list of billing codes in the **Add Billing Code** dialog box.

NOTE: If any of the fields are not populated, there are any characters in the Billing Code field that are not letters, numbers, a hyphen, or a period, or the Description field has a backslash character, an error message will appear when you select Add Code to Payable Service.

**NOTE:** The error message can be dismissed by selecting the X button.

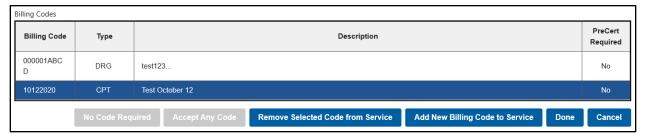
Manage Billing Codes for Payable Service × Search by billing code Billing code 10122020 added to Payable Service × PreCert Billing Code Description Required CPT Test October 12 10140 CPT 10141 CPT Incision And Drainage Of Hematoma: Complicated No 10160 CPT Puncture aspiration of abscess, hematoma, bulla, or cyst No 10180 CPT Incision and drainage, complex, postoperative wound infection Nο 1022F CPT Pneumococcus immunization status assessed (CAP, COPD Co-morbid conditions assessed (eg, includes assessment for presence or absence of: malignancy, liver disease, congestive heart Add Code to Payable Service **Define New Code** 

Figure 98: Edit SEOC: New Billing Code Added Message

**NOTE:** The confirmation message can be dismissed by selecting the X button.

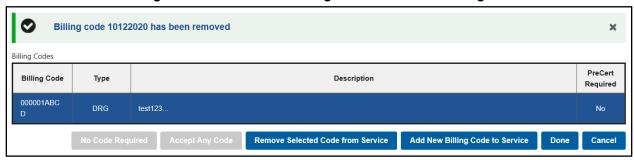
49. Select **Done**. The **Edit SEOC: Add Payable Service** section will display.

Figure 99: Edit SEOC: Billing Codes added to the Payable Service



50. If needed, you can select a **Billing Code** row and select **Remove Selected Code from Service** to remove a **Billing Code**. A confirmation message will display.

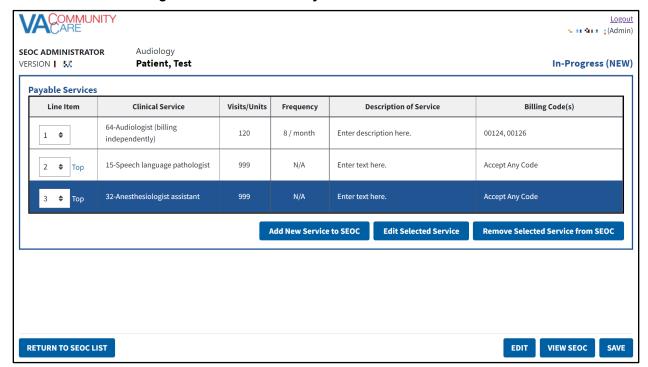
Figure 100: Edit SEOC: Billing Code Removed Message



**NOTE:** The confirmation message can be dismissed by selecting the X button.

51. Select **Done**. The **Edit SEOC: Payable Services** section displays at the top of the page.

Figure 101: Edit SEOC: Payable Service Added to SEOC



NOTE: If any of the required fields are not populated, or if Allowable Visits/Units or Frequency are not numbers within the specified range, an error message will appear when you select Done.

NOTE: The error message can be dismissed by selecting X.

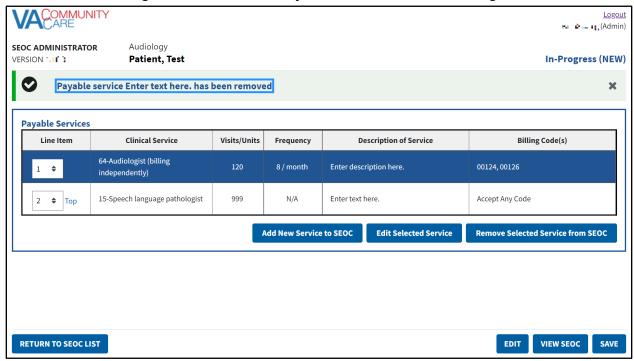
52. If needed, you can select a **Payable Service** row and select **Remove Selected Service** from **SEOC** to remove a **Payable Service**. The **Confirm Delete Payable Service** dialog will display.

Figure 102: Edit SEOC: Delete Payable Service Confirmation



53. Select **Confirm Deletion** to remove the **Payable Service**. A confirmation message will appear.

Figure 103: Edit SEOC: Payable Service Removed Message



*NOTE:* The confirmation message can be dismissed by selecting the *X* button.

54. You can also select a **Payable Service** row and select **Edit Selected Service** to edit the selected **Payable Service**.

- 55. To reorder the list of the Payable Services, select the position from the **Line Item** drop-down menu.
- 56. Select Save.
- 57. Select View SEOC. The information you entered will be displayed, including Provider Taxonomy Codes (HPTCs) and Payable Services. The In-Progress (New) status will display in the window.

Figure 104: Edit SEOC: View SEOC (1 of 2)

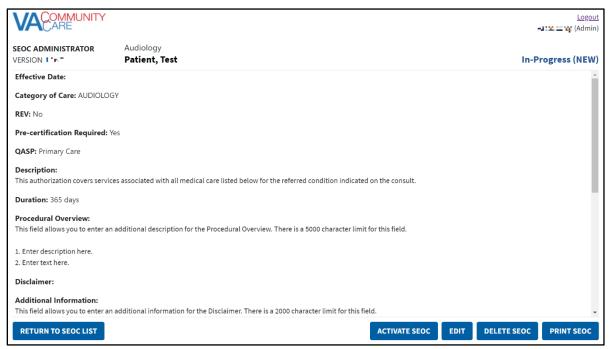
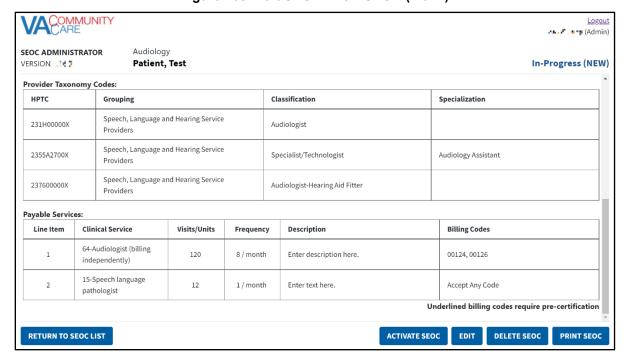


Figure 105: Edit SEOC: View SEOC (2 of 2)



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## 4.7.1. Edit an In-Progress SEOC

**NOTE:** If a user attempts to edit a SEOC that another user is already editing, the user will receive a message stating that the request can't be processed.

**NOTE:** If a user attempts to edit a SEOC while the system is in maintenance mode for Billing Code Management, the user will receive a message stating that the request can't be processed.

To edit a SEOC that is currently marked as In-Progress, follow the steps listed below:

- 1. From the SEOC Admin home page, select the SEOC you would like to edit.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select **EDIT SEOC**. The **Edit SEOC**: Name window displays.
- 4. Follow the workflow in the previous section to edit any fields as necessary.
- 5. Select **View SEOC** to confirm the edits.

## 4.7.2. Activate an In-Progress SEOC

To activate a SEOC that is currently marked as In-Progress, follow the steps listed below:

- 1. From the SEOC Admin home page, select the SEOC you would like to activate.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select Activate SEOC.

**NOTE:** Once the SEOC is activated, the previous version status is automatically set to Discontinued.

4. If there are activation errors, the **Activation Error** dialog will display listing what needs to be resolved before the **SEOC** can be activated.

Figure 106: SEOC Activation Errors

## All of the following issues must be resolved prior to activation



· SEOC QASP is not selected



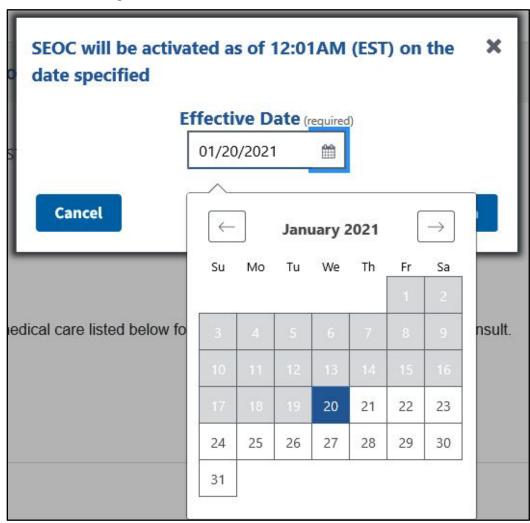
5. If there are no activation errors, the **Confirm Activation** dialog displays.

**Figure 107: SEOC Activation Confirmation** 



6. The **Effective Date** will default to the next day at 12:01AM EST. If needed, enter a new **Effective Date** in the input or select the calendar icon to select a date.

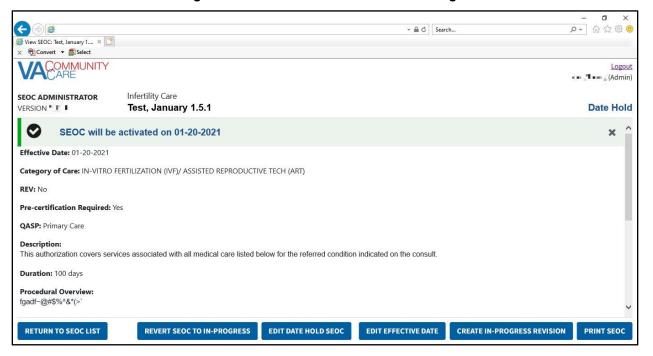
Figure 108: SEOC Activation Confirmation Calendar



7. Select **Confirm Activation**. A confirmation message will display. The **Date Hold** status will display in the upper-right-hand corner of the page.

NOTE: The SEOC will remain in Date Hold status until 12:01AM EST on the specified Effective Date. At that time, the SEOC will change to Active status.

Figure 109: SEOC Will be Activated Message



*NOTE:* The confirmation message can be dismissed by selecting the *X* button.

8. Select **Return to SEOC List** to see the **SEOC** in the list with a **Date Hold** status.

# 4.7.3. Delete an In-Progress SEOC

To delete a SEOC that is currently marked as In-Progress, follow the steps listed below:

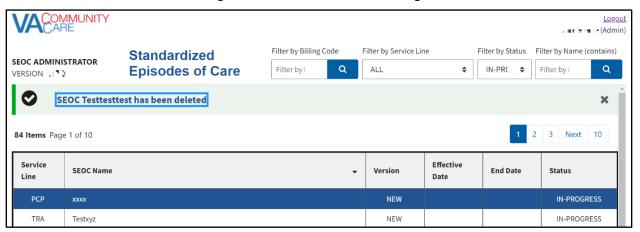
- 1. From the SEOC Admin home page, select the draft SEOC you would like to delete.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select **Delete SEOC**. The **Confirm Deletion** dialog box displays.

Figure 110: Confirm Deletion



4. Select **Confirm Deletion**. The SEOC is deleted from the SEOC List.

Figure 111: SEOC Deleted Message



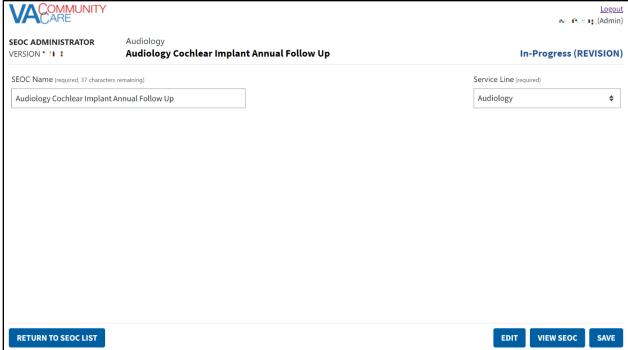
# 4.8. Pending Revisions

### 4.8.1. Create a Revision

To create a revision to an existing SEOC, follow the steps listed below:

- 1. From the SEOC Admin home page, select the active SEOC you would like to create a pending revision.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select Create Pending Revision. The Revision: Name and Service Line window displays.

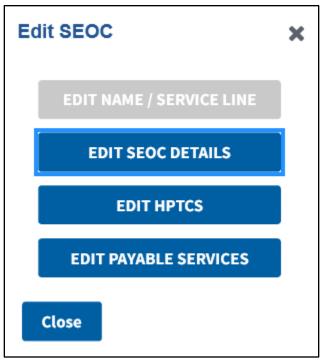
Figure 112: Revision: Name and Service Line



**NOTE:** To return to the SEOC Admin home page while editing a new **SEOC** or **Revision**, select **Return to SEOC List** in the bottom left-hand corner of any page in the **Edit SEOC** workflow.

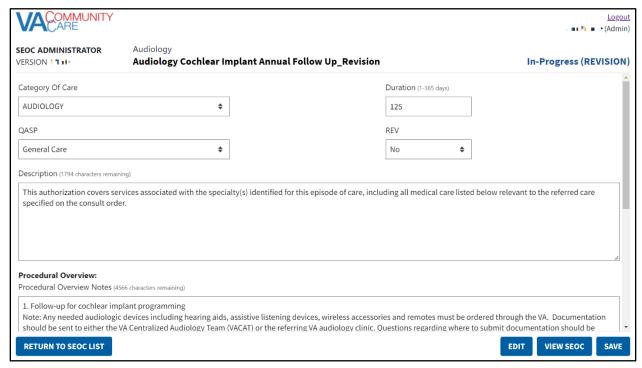
- 4. Update the **SEOC Name** and **Service Line** as needed.
- 5. Select Edit. The Edit SEOC dialog box displays.

Figure 113: Edit SEOC Dialog Box



6. From the **Edit SEOC** dialog box, select **Edit SEOC Details**. The **Revision: Details** window displays.

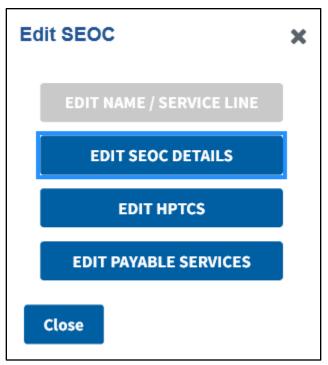
Figure 114: Revision: Details



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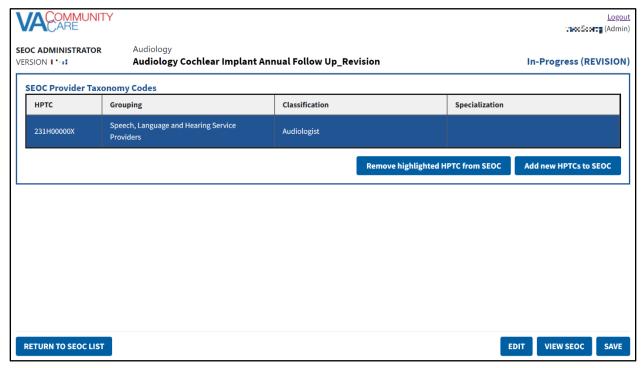
- 7. Update the details for the SEOC as needed.
- 8. Select **Edit**. The **Edit SEOC** dialog box displays.

Figure 115: Edit SEOC Dialog Box



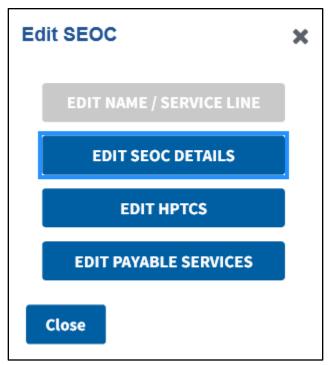
9. From the Edit SEOC dialog box, select Edit HPTCs. The Revision: SEOC Provider Taxonomy Codes window displays.

Figure 116: Revision: SEOC Provider Taxonomy Codes



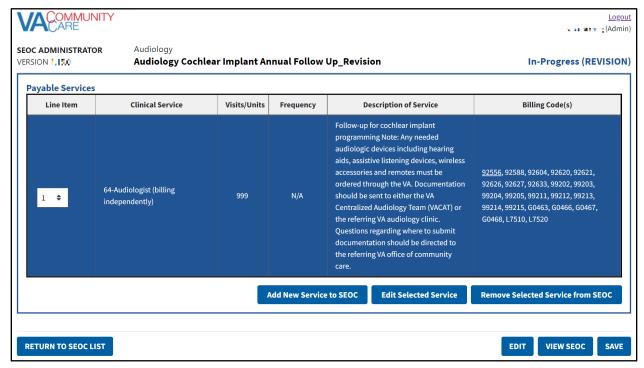
- 10. Update the **Provider Taxonomy Codes (HPTCs)** for the **SEOC** as needed.
- 11. Select **Edit**. The **Edit SEOC** dialog box displays.

Figure 117: Edit SEOC Dialog Box



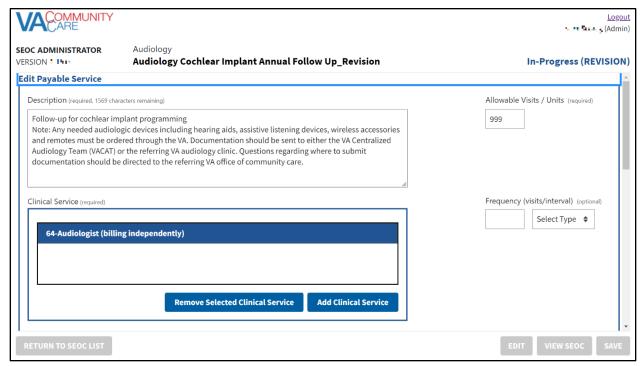
12. From the **Edit SEOC** dialog box, select **Edit Payable Services**. The **Revision: Payable Services** window displays.

Figure 118: Revision: Payable Services



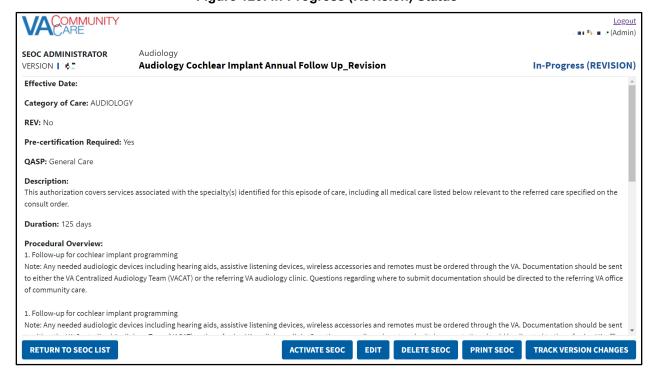
- 13. Select a Payable Service.
- 14. Select Edit Selected Service. The Edit Payable Service section will display.

Figure 119: Edit Payable Service



- 15. Make any desired updates
- 16. Select **Done**. The **Revision: Payable Services** page will display.
- 17. Repeat steps 10-13 for the other **Payable Services** as needed.
- 18. Select View SEOC. The In-Progress (Revision) status will display in the window.

Figure 120: In-Progress (Revision) Status



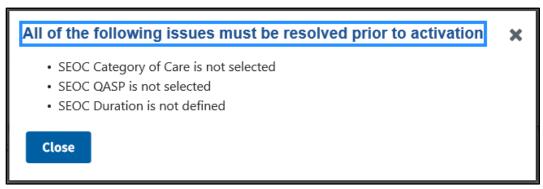
19. Select **Return to SEOC List**. The **Revision** will display in the list of **SEOCs**.

#### 4.8.2. Activate a Revision

To activate a pending revision, follow the steps listed below:

- 1. From the SEOC Admin home page, select the **In-Progress (REVISION) SEOC** that you would like to activate.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select **Activate SEOC**. If there are activation errors, the **Activation Error** dialog will display listing what needs to be resolved before the **SEOC** can be activated.

Figure 121: Revision Activation Errors



4. The **Revision Activation Confirmation** message displays.

Figure 122: Revision Activation Confirmation Message



5. The **Effective Date** will default to the next day at 12:01AM EST. If needed, enter a new **Effective Date** in the input or select the calendar icon to select a date.

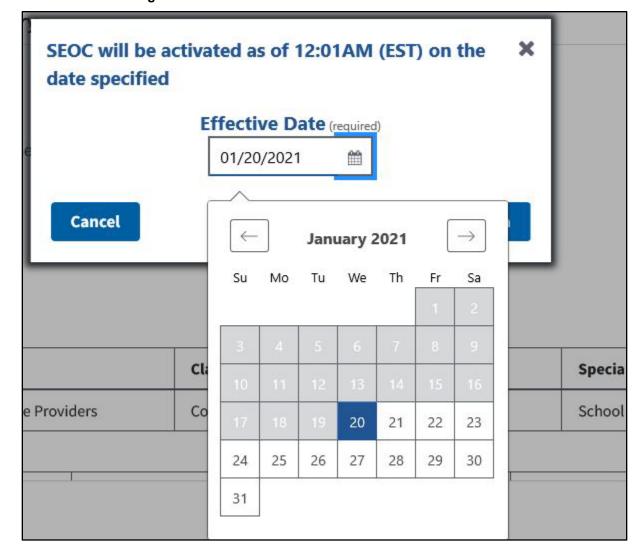


Figure 123: Revision Activation Confirmation Date Calendar

6. Select **Confirm Activation**. A confirmation message will display. The **Date Hold Status** will display in the upper-right-hand corner of the page.

o → 🖴 🖒 Search... **₽-** ₩₩ @ Ø View SEOC: lwseoc1\_Januar... × Convert ▼ 🔠 Select COMMUNITY Emergent-Urgent Care SEOC ADMINISTRATOR lwseoc1\_January 1.0.4 VERSION \* F **Date Hold** SEOC will be activated on 01-20-2021 × Effective Date: 01-20-2021 Category of Care: EMERGENCY CARE REV: No Pre-certification Required: No QASP: General Care Description: This authorization covers services associated with all medical care listed below for the referred condition indicated on the consult **Duration:** 1 days Procedural Overview: EDIT DATE HOLD SEOC REVERT SEOC TO IN-PROGRESS EDIT EFFECTIVE DATE **CREATE IN-PROGRESS REVISION** RETURN TO SEOC **PRINT SEOC** TRACK VERSION CHANGES

Figure 124: Revision Will be Activated Message

7. Select **Return to SEOC List**. The pending revision that you just activated will display as **Date Hold** in the list of SEOCs.

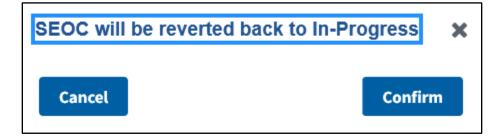
NOTE: The Revision will remain in Date Hold status and the previous SEOC will remain in Active status until 12:01 AM EST on the specified Effective Date. At that time, the Revision will change to Active status and the previous SEOC will change to Discontinued status.

## 4.8.3. Revert a Date Hold SEOC Back to In-Progress

If you need to revert the selected SEOC to In-Progress, follow the steps listed below:

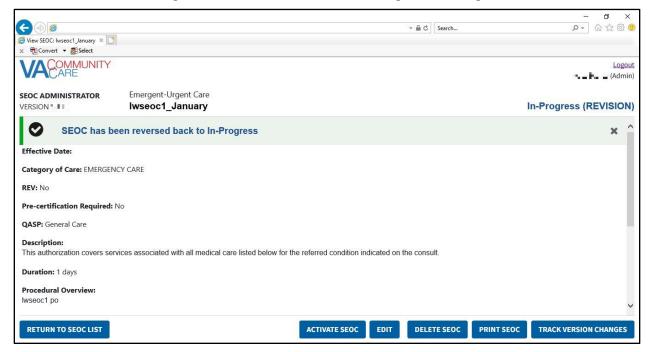
- 1. From the SEOC Admin home page, select the **Date Hold SEOC** you would like to revert to **In-Progress**.
- 2. Select **View Selected SEOC**, the **View SEOC** page displays.
- 3. Select **Revert SEOC to In-Progress**. The **Confirm Revert SEOC to In-Progress** dialog will display.

Figure 125: Confirm Revert SEOC to In-Progress



4. Select **Confirm**. The **SEOC** will be reverted to **In-Progress** and a confirmation message will display.

Figure 126: SEOC Reversed to In-Progress Message



**NOTE:** The confirmation message can be dismissed by selecting the X button.

## 4.9. Date Hold SEOC

### 4.9.1. Create a Date Hold SEOC

To create a Date Hold status for an In-Progress SEOC, follow the steps listed below:

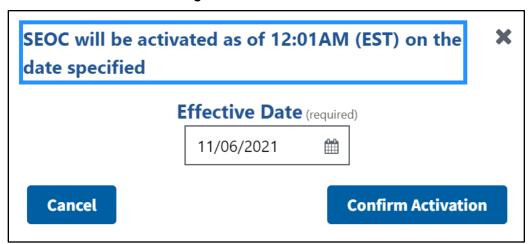
1. From the SEOC Admin home page, select the SEOC with an In-Progress status you would like to edit.

**NOTE:** SEOC allows you to create multiple Date Hold documents for the same SEOC version.

- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select Activate SEOC. The Activate SEOC dialog box displays.

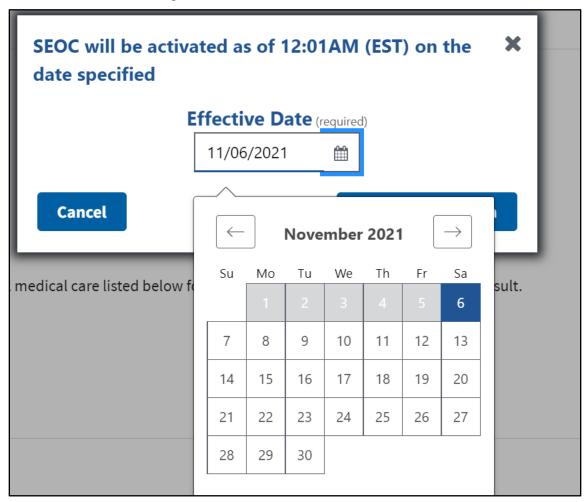
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Figure 127: Activate SEOC



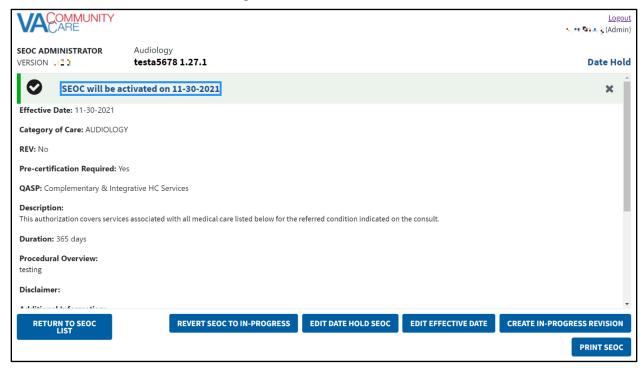
4. In the **Effective Date** field, enter or select the calendar icon to select a date. The SEOC will be activated as of 12:01 AM EST on the date specified.

Figure 128: Activate Confirmation Calendar



5. Select **Confirm Activation**. The **View SEOC** page displays with the SEOC activation date.

Figure 129: Activation Status

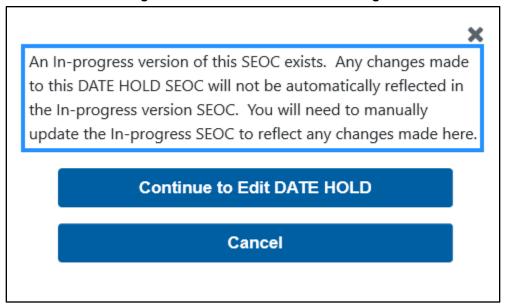


### 4.9.2. Edit Date Hold SEOC

To edit a SEOC that is currently marked as Date Hold, follow the steps listed below:

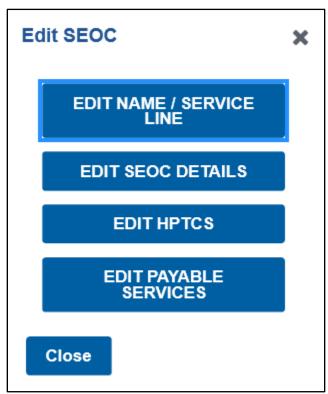
- 6. From the SEOC Admin home page, select the SEOC with a Date Hold status you would like to edit.
- 7. Select View Selected SEOC, the View SEOC page displays.
- 8. Select Edit Date Hold SEOC. The Edit Date Hold SEOC dialog box displays.

Figure 130: Edit Date Hold SEOC Dialog Box



9. Select Continue to Edit Date Hold. The Edit SEOC dialog box displays.

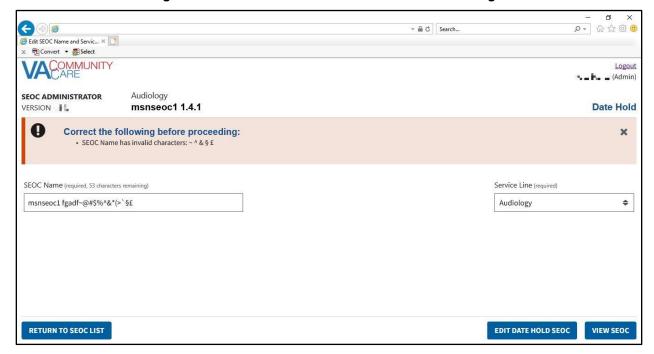
Figure 131: Edit SEOC Dialog Box



10. Navigate to Edit Name/Service Line, Edit SEOC Details, Edit HPTCS, and Edit Payable Services to make the needed edits.

**NOTE:** If invalid characters are used when editing the Date Hold SEOC, the Date Hold Invalid Characters Error Message will display at the top of the page. You must correct the issues before proceeding.

Figure 132: Date Hold Invalid Characters Error Message



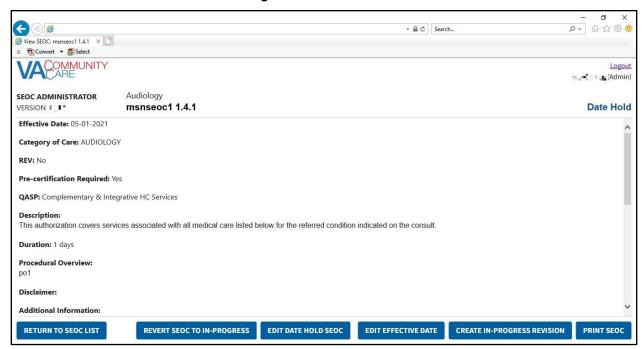
11. Select View SEOC. The View SEOC page displays with the Date Hold edits.

#### 4.9.3. Edit Effective Date of Date Hold SEOC

To edit the activation date on a Date Hold SEOC without reverting to an In-Progress status, follow the steps listed below:

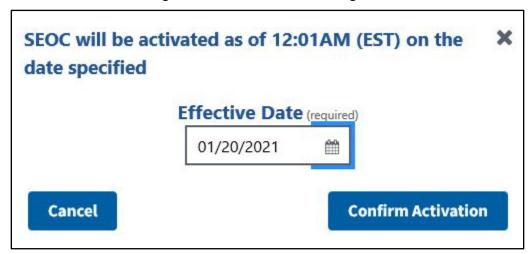
- 1. From the SEOC Admin home page, select the SEOC with a Date Hold status that you would like to edit.
- 2. Select View Selected SEOC, the View SEOC page displays.

Figure 133: View SEOC



3. Select **Edit Effective Date**. The **Effective Date** dialog box displays.

Figure 134: Effective Date Dialog Box



4. The **Effective Date** will default to the next day at 12:01AM EST. If needed, enter a new **Effective Date** in the field or select the calendar icon to select a date.

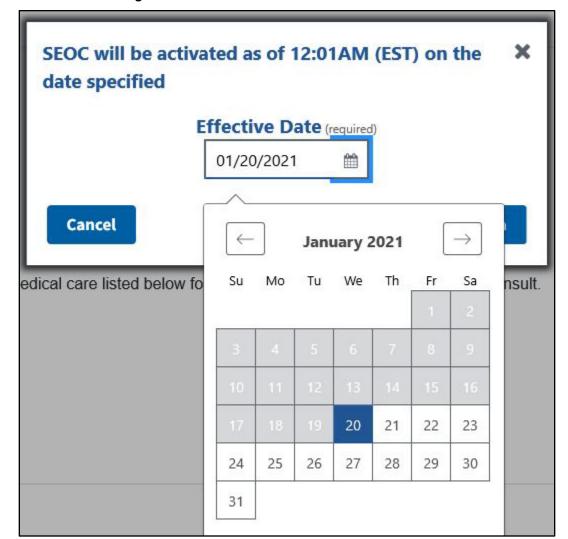


Figure 135: SEOC Activation Confirmation Calendar

5. Select **Confirm Activation**. A confirmation message will display. The **Date Hold** status will display in the upper-right-hand corner of the page.

Ð **₽-** ☆☆ → 🗎 🖒 Search... Ø View SEOC: msnseoc1 1.4.1 × □ × €Convert ▼ 🔠 Select COMMUNITY CARE Logout \_\_\_\_(Admin) Audiology SEOC ADMINISTRATOR msnseoc1 1.4.1 **Date Hold** VERSION L SEOC will be activated on 01-21-2021 × Effective Date: 01-21-2021 Category of Care: AUDIOLOGY REV: No Pre-certification Required: Yes QASP: Complementary & Integrative HC Services Description: This authorization covers services associated with all medical care listed below for the referred condition indicated on the consult. Duration: 1 days **Procedural Overview:** RETURN TO SEOC LIST REVERT SEOC TO IN-PROGRESS EDIT DATE HOLD SEOC EDIT EFFECTIVE DATE CREATE IN-PROGRESS REVISION

Figure 136: Date Hold Effective Date Update Confirmation

# **Appendix A: Troubleshooting**

Users may encounter the following errors while using the SEOC UI.

**Table 2: SEOC Error Codes with Descriptions** 

Error Code	Description
204	No Content Found
401	Unauthorized
403	Forbidden
404	Not Found

# **Appendix B: Acronyms and Abbreviations**

Acronym	Definition
API	Application Program Interface
CC	Care Coordination
CCAD	Community Care Agile Development
CPRS	Computerized Patient Record System
CPT	Current Procedural Terminology
HSRM	HealthShare Referral Manager
EO	Enterprise Operations
JSON	JavaScript Object Notification
MVC	Model-View-Controller
NSD	National Service Desk
OIT	Office of Information and Technology
PHI	Protected Health Information
PII	Personally Identifiable Information
PIV	Personal Identification Verification
REST	Representational State Transfer
SEOC	Standardized Episode of Care
SQL	Structured Query Language
SSOI	Single Sign-On Integration
UI	User Interface
VA	Department of Veterans Affairs
VDL	VA Software Document Library
VIP	Veteran-focused Integrated Process
VistA	Veterans Health Information Systems and Technology Architecture

# **Appendix C: JSON Instructions**

*NOTE:* The steps outlined below are for Excel 2016.

To convert the SEOC JSON file to an Excel file, follow the steps listed below:

- 1. Select to download the SEOC JSON file. The Internet Explorer File Download Prompt displays at the bottom of the window.
- 2. From the Save menu, select Save as. The Save As window displays.
- 3. Select to download the file to the Desktop and select **Save**.
- 4. Open a blank workbook in Excel 2016.
- 5. Select the **Data** tab, then **Get Data** > **From File** > **From JSON**. The **Import Data** window displays.

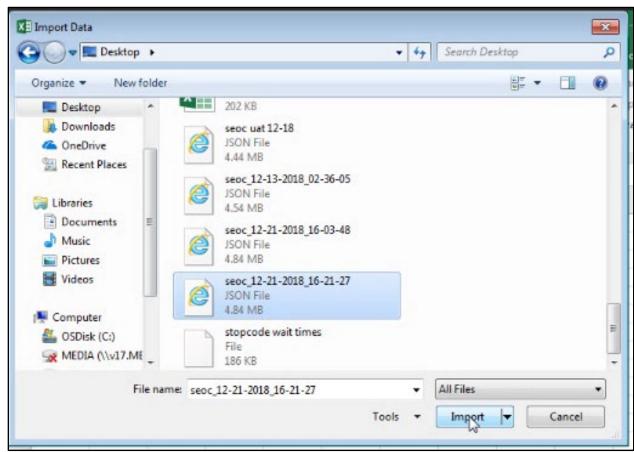
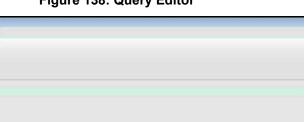


Figure 137: Import Data Window

6. Select the JSON file you downloaded and select **Import**. Excel will open the file in the Query Editor.



Query Settings

PROPERTIES
Name

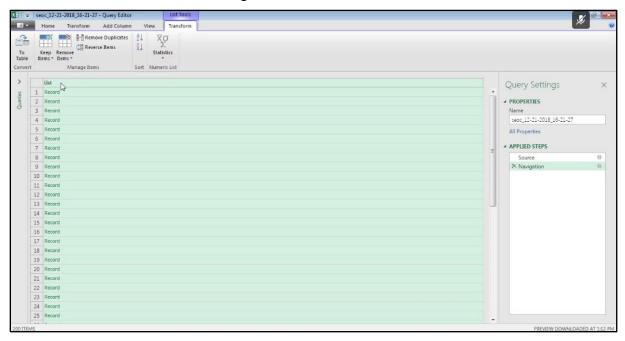
seoc\_12-21-2018\_16-21-27
All Properties

APPLIED STEPS
Source

Figure 138: Query Editor

7. Select the **List** header to the right of **Seocs** to display a list of records.

Figure 139: List of Records



8. From the **Transform** tab, select the **Convert To Table** icon and select **OK**. The **To Table** dialog box displays.

= | seoc\_12-21-2018\_16-21-27 - Query Editor

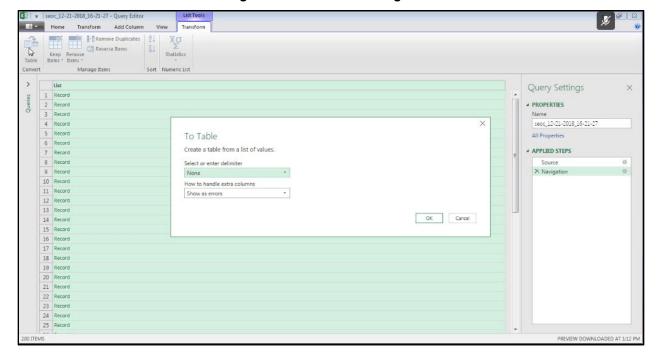


Figure 140: To Table Dialog Box

- 9. From the **To Table** dialog box keep the default selections and select **OK**.
- 10. Select on the expand icon (<-||->) to the right of the Column1 header to display the Search Columns to Expand dialog box.

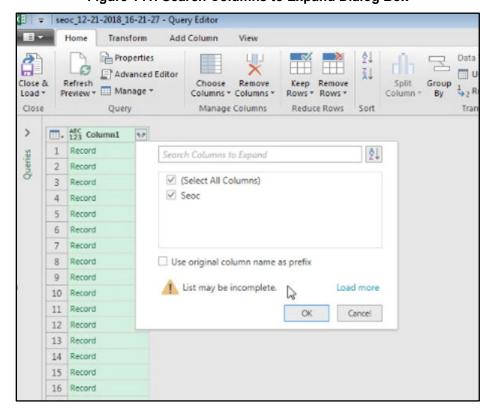
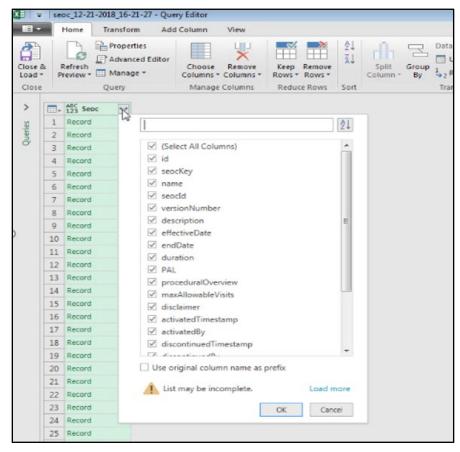


Figure 141: Search Columns to Expand Dialog Box

- 11. De-select the Use original column name as prefix check box.
- 12. Select **OK**.
- 13. Select on the expand icon (<-||->) to the right of the **Seoc** header to display the **Search Columns to Expand** dialog box.

Figure 142: Search Columns to Expand



- 14. Uncheck the Use original column name as prefix check box.
- 15. Select **OK**. The fields in the SEOC table will be expanded to columns as shown below.

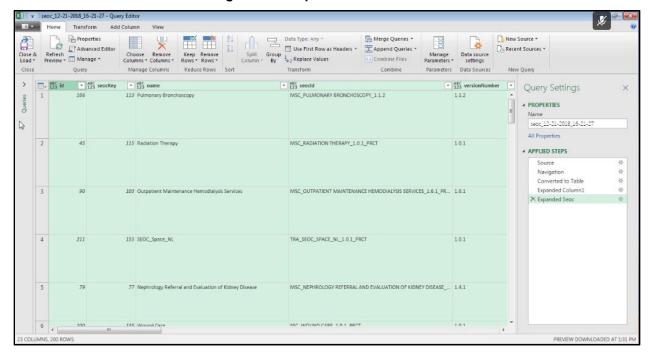


Figure 143: Expanded SEOC Fields

16. Scroll right to the **services** column, select on the expand icon, and select **Expand to New Rows** to display the records.

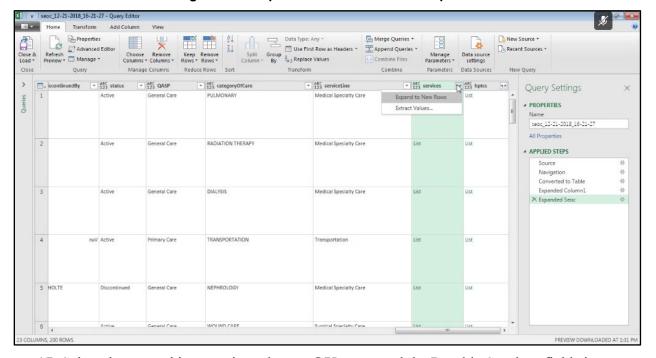


Figure 144: Expand to New Rows Menu Option

17. Select the expand icon again and press **OK** to expand the Payable Services fields into columns.

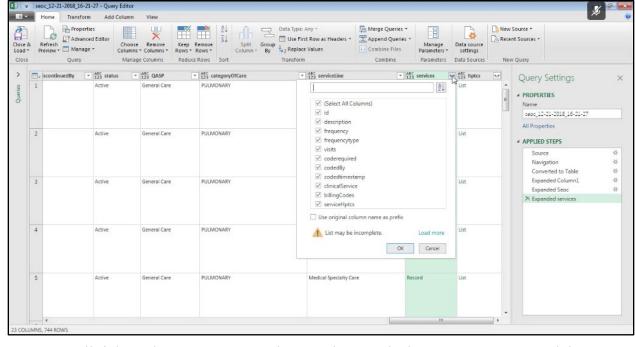


Figure 145: Payable Services Columns

18. Scroll right to the **billingCodes** column and repeat the last two steps to expand the **Billing Code** fields into columns.

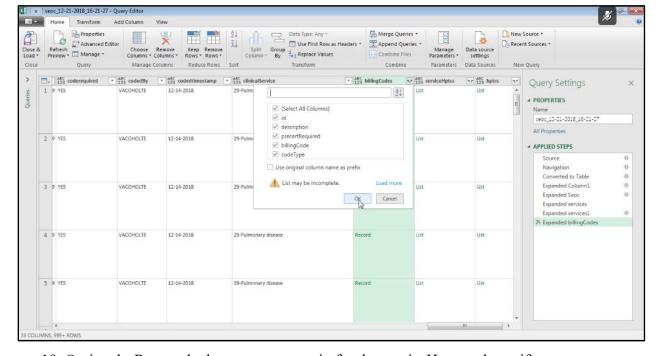


Figure 146: Billing Code Columns

- 19. Optional Repeat the last two steps again for the serviceHptcs column if you want to see the cross-walked HPTCs that are sent for each Payable Service.
- 20. Scroll right and repeat the last two steps again for the hptcs column to expand the HPTC fields that were assigned to each SEOC.

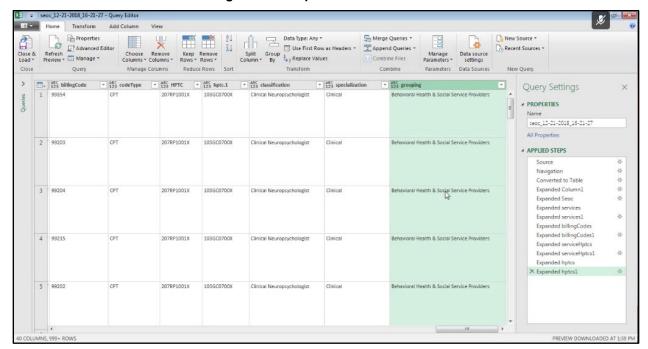


Figure 147: Expanded HPTC Fields

21. Select the **Close & Load** option at the left of the ribbon to create load the imported data into a spreadsheet tab.

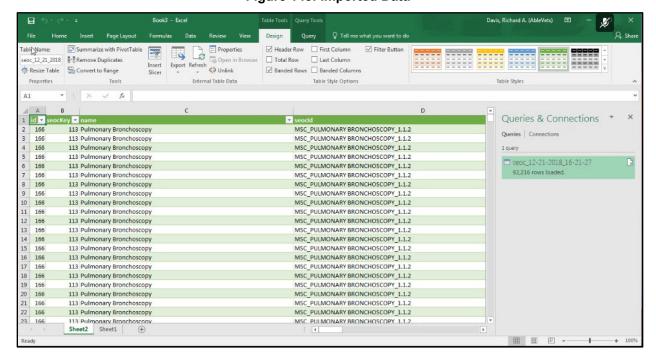


Figure 148: Imported Data